

*Neil Wood Consulting ~ Hingham, Massachusetts ~ 781 264-3361*

*Sales Training ~ Keynote Presentations ~ Practice Management*

- I. **Why work smarter?** Increased focus time on best (most profitable) clients = more assets, referrals and stronger relationships. It also leads to more “free” time to do things you enjoy (besides work). Leads to less stress, more control of your day, career & life! Greater client retention and acquisitions. 68% of clients left advisors because they never felt valued or appreciated. What would your top 50 say about you??
- II. **How to work smarter:** Know your top 20% as well as you know your best friend. Create a detailed CLIENT PROFILE page. Contact regularly, especially on special occasions. Ask questions, then be unique: LISTEN. Host regular client events, which are fun and interesting. (Not expensive) Work your favorite niche; with people you share common ground with.
- III. **Market YOU!** Clients do business because of YOU! Products are solutions but commodities. YOU add the value! Take client and 2 friends out for their birthday. AAA Baseball games with grandkids. Day at Zoo; First Aid course for grandparents; Wine-tasting, Be creative – ask clients what they enjoy. Focus on Relationships more than ever!
- IV. **Story-telling and Consultative Selling,** Prices from 1970s & 1980s, know the BIG days in the markets (1987, 1995, 1999, 2002) Your 60 year-old client knows them dearly!
- V. **Do Business with people you like! It’s your business & Life!**

***“You cannot control the markets, but you DO control YOUR activities!  
Focus on the opportunities and the BEST use of your time, right now!”***

*www.neilwoodconsulting.com*

