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**Value Proposition** worksheet

DESCRIPTION/INSTRUCTIONS:

*A value proposition is a clear statement that explains how your unique approach and services can help your clients. By clearly stating the purpose, for both you and your clients of the work you do, the decision each client makes to work with you will be easy. A value proposition will help you articulate:*

*1. Your ideal client and how your firm is uniquely positioned to help with their financial needs (resonate).*

*2. How you will deliver specific services and benefits designed to help solve their challenges (differentiate).*

*3. Why clients should work with you, rather than someone else (substantiate).*

*4. The outcome of the work that you will do with and for your clients (key benefits).*

*This worksheet will help you think through and capture the elements of a well-defined value proposition. Refer to the* ***Value Proposition Vocabulary*** *at the end of this worksheet to help you complete the exercise.*

***Instructions:***

*Review each statement or question and example and write up to three description/answer statements.
Of the description statements you write, circle the one you prefer and use your circled description statements to capture your value proposition.*

*See the examples on page 2 to help you get started.*

**Value Proposition Examples**

# Example 1:

**We work with single female executives who have the know-how but not the time or desire to deal with the various aspects of their financial lives.** (Target Client/Statement of Need)

**We take the time to learn your values and vision of what financial success means to you and we use technology to consolidate and present a clear overview of all the moving pieces of your financial life.**

(How we Solve for your Problem/Our Differentiator) achieve

**Our firm will help reinforce all of the positive choices you have made and will continue to make in your lifetime.** (Key Benefits)

# Example 2:

**We work with clients who have spent their professional careers committed to building stronger communities. As leaders in their chosen industry, they have followed their passions and spent countless hours in an effort to reach their current level of financial success. For many, the question now is, *“How do I manage, guard and protect what I have worked so hard to achieve?”***

(Target Client/Statement of Need)

**As business owners, we understand the diverse needs and concerns of our clients. From complicated regulatory rules, risk evaluation and liquidity needs to the management of appreciated assets, philanthropic planning and donation strategies, it can often be a maze of choices and decisions. We believe highly complex situations require highly trained professionals - who can go deep and really understand the specific concerns and ensure that the strategy set forth not only addresses the client need but also aligns with their overall philosophies and beliefs.**

(How we Solve for your Problem/Differentiator)

**We understand the devotion it takes to reach this level of success and we are as invested in our clients as they are to theirs.**  (Key Benefit)

**Value Proposition worksheet**

# Who is your target client?

**List profiles for three target clients.**
For example: *People enjoying their retirement, People approaching retirement, Busy sales professionals*

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***Circle the best one.***

# Statement of Need, Frustration or Financial Problem

**List the types of problems or frustrations that may be experienced by your clients.**For example:

* *Frustrated with attempts to generate income by low interest rates and volatile financial markets*
* *Concerned that certain strategies will not produce the growth they need to fund* their retirement
* *Want to protect their loved ones from the unique risks of frequent business travel*

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***Circle the best one.***

# Statement of How We Can Help You Solve Your Problem

**List how you can help solve your clients’ needs, frustrations or financial problems.**
For example:

* *Can help you protect your capital, generate income and minimize taxes to provide you with the income you need from your investments to live your desired lifestyle*
* *Will help you identify alternative investment solutions to get you back on track to your retirement goals*
* *Will help you develop a plan to achieve financial independence for you and your loved ones*

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***Circle the best one.***

# Statement of Principles and Philosophies

(see Value Proposition Vocabulary)

**What do you believe? List out your top three.**For example:

* *We believe that the fiduciary status is not just some government regulation; it is a promise that we have always made to every client to provide them with the highest level of care possible.”*
* *That investors across America may continue to be disappointed by unpredictable investment markets and fall short of producing the income they require to live the retirement lifestyle they had planned by following pre-2000 investment approaches.*
* *Planning for the financial independence of your family can be structured to accommodate the schedules of busy executives by using technological innovations so you always know where you are today, where you and your family hope to be in the future and how you plan to get there.*

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***Circle the best one.***

# Statement of Key Benefits

(see Value Proposition Vocabulary)

**List some ways in which people who meet your target client profile benefit by working with you and your firm.**For example:

* *Generate consistently high levels of investment income, minimize volatility and clearly understand and avoid risks that may erode your capital.*
* *Properly diversify your investment portfolio against unnecessary risk so you can gain peace of mind as you look forward to a happy and successful retirement.*
* *Be able to provide for your family today and in the future, knowing that your family will be well cared for under any circumstances.*

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***Circle the best one.***

# Building your Value Proposition

**Pulling from all the components above, complete your Value Proposition Statement below.**

|  |  |
| --- | --- |
| ***For*** *(target client)* |  |
|  |  |
| ***Who****(what do they struggle with)* |  |
|  |  |
| ***At*** *(firm name)* |  |
|  |  |
| ***We believe****(how you solve for client struggle /philosophy)* |  |
|  |  |
| ***We can help you solve this by*** |  |
|  |  |
| ***By workingwith us, you will*** *(overall client benefit)* |  |

Value Proposition Vocabulary

# Attributes of the firm and its employees

Able Accomplished Accountable Active
Adept
Advanced Business owner Capable Competent Comprehensive Credible Developed Devised
Educated Entrepreneurial

Excellent Executed Executive Exemplary Experienced Expert Extraordinary Focused
Formed Formulated Global
Highly trained Implemented Incorporated Initiated

Instituted Intellectual Intelligent
Knowing Knowledgeable Leadership Logical
Mastery
One-of-a-kind Outstanding Oversaw
Owner
Partner
Perceptive Planned

Practiced Premier
Prepared Proactively Produced Professional Proficient Proprietorship Qualified Responsible Savvy Shareholder Sharp
Skillful
Smart

Spearheaded Specialize in Staff
Star performer Stakeholders Supplier Talented
Team
Teamwork
Trust Trustworthy Unparalleled
Up-to-speed

Wealth mgmt specialists

# Benefits to the client

Achievement Add Value Advance Affordable Appreciation Attained Awarded
Benefit
Boost
Bottom Line Capitalized Competitive Complete
Comprehensive Conservative Conserve Consistent
Create Wealth Credible
Customer- Oriented
Customize Decrease

Deduct
Delivered
Earn
Enhance
Estate Planning Exceed
Excel
Expand Expectation Expedited
Extend
Finances
Finish Ahead Fortune
Funding Furthered

Gained

Generate Prosperity

Generate Success

Generate Wealth

Generated
Get Big Fast Goal
Growth

Growth Potential

Guarantee Guide
Help
High Yields High-Earning Improve Improvement Increase Legacy Lessened
Lifted Maximized Move Ahead Opportunity Outpace Outperform Overcome

Partnership Performance Personalized Portfolio
Position
Potential
Profit
Profitability Profitable Progress Prosperity Purpose
Raise
Reduce Costs Reductions Results
Retain
Return
Revenue

Revenue Stream

Reward

Rewards Program

Satisfaction Save
Secure Services
Set Goals Specialize Succeed Support Surpass

Tailored Solutions

Tax-Efficient Investing

Transparent Value

Value-Priced

White/Blue Collar

Work-Saving Yielded

# A reason the attributes produce benefits

Accelerate Access Accomplish Accountability Accountable Accurate Achieve Achievement Acquire
Adapt
Adaptable Administer Advantage Advise Aggressive
Aim
Aligned Alternative Ambitious Analytical Analyzed Approach Arbitrate Articulate Assemble Assessed
Astute
Attentive
Audited
Authority Authorized Briefed
Broadly Diversified
Business Model Calculated

Capital Preservation

Careful Centralized Charter Clarified
Clarify
Clinch Commerce
Communication

Composed
Concept Conceptualize Conduct Consistency Consolidated Construct
Consult
Contract
Control
Convert
Convey Coordinate Correspond
Cost Structure

Counsel

Cultivate Relationships

Cutting-Edge
Deal
Decide
Define
Deliver Demonstrate Dependable Detailed Develop
Devise Diagnose Diligent Diplomatic Directed Discuss Dispatch Division Document
Draft
Draw Up Economical Economy Edit Effective Efficient
Effort
Eloquent
Employ
Enforce
Engineer

Ensured Enterprising Establish Evaluate Examine Expansion Fielded
Finance
Follow Through Follow Up Forecast Formalize
Hard Work Identified Implementation Improvement Incentive

Income Generation

Independent Indispensable Industrious Informed Innovative Insightful Inspected Instrumental Integrated Interpret Investigate Itemize
Join
Key
Launch
Leading
Low Turnover Low Volatility Management Mapped Marketplace Measure
Merge Methodical Meticulous Milestone
Modified

Monitor

Multiple Systems

Navigate Negotiate Network Objectivity Optimize Orchestrated Organization Organized Overhaul Partnerships Planning Precise Preferred Premier
Price
Proactive

Problem- Solving

Product Productive Productivity Programmed

Proven Track Record

Prudent
Punctual
Pursue
Quantified Rational
Reach Reasonable Recognize Recommended Redesigned Referral
Refined Refocused
Regional
Regulate Reinforce
Remodel Reorganize
Replace
Research

Resource Resourceful Restructured

Results- Oriented

Revamped Review Rework
Safe
Scope
Screen Scrutinized Sector
Serious
Show Signature Simplified Solution
Solve
Stability Stable
Standardized Strategic Streamlined Strengthen Supply Surveyed Sustained Tactical
Take Action Targeted Tested Thorough
Time-Saving Track
Train
Unique Update Upgraded Useful
Verified
Versatile
Well-Oiled Well-Rounded Working

# A degree of emotion

Achieve
Advance
Advise
Advocate
Ambition
Amplify Appreciative Approachable Attuned
Authored
Blocked
Bold
Boosted Brainstorm
Built
Campaigned Candid
Challenge Champion
Clincher
Coach
Committed Confidence Confident
Conscientious Conviction Convinced Cooperative Counseled Created
Creative
Critiqued
Cultivate
Curious

Customer Care

Customer Loyalty

Daring
Decisive Dedicated
Design Determination Determined Discovered Discreet
Dominate
Dream
Driven
Dynamic

Ease Nervousness

Easygoing

Easy-To-Get- Along-With

Educated
Empower
Enable
Encourage
Energetic
Enthusiastic
Entrust
Envision
Ethical Excellence Explore
Facilitate
Fair
Familiar
Fight For
Forge
Foster
Founded
Fresh Ideas Friendly
Game-Changing

Go Above and Beyond

Go the Distance

Guided
Hands-On
Happy
Helpful
Honest
Ideas
Illustrate
Imaginative
Impact
Impressive
Influence
Influential
Inspire
Integrity
Lobbied
Loyal
Mature
Mentored
Mobilized
Moral
Motivated
Mutual Respect
Navigated
Negotiated
On-Target
Open

Open Communication

Open Doors
Open-Minded
Outgoing
Partner
Passionate
Patient
Persistent
Persuasive
Pleasant
Positive
Power
Priorities
Progressive
Prolific
Promoted
Protect
Publicize
Quality-Conscious

Reconcile
Reinvent
Reliable
Relieve concerns

Resilient
Resolved
Responsibility
Revitalize
Revolutionary
Revolutionize
Role Model
Self-Made Man/Company
Shaped
Showcase
Social
Stimulated
Stress-Free
Strive
Strong
Succeeded
Support
Sweat
Tactful
Taught
Teach
Tenacious
Tenacity
Transformed
Unified
United
Unwavering
Values
Visionary
Willing
Work Together
Zealous