

The Strategic Partner FIT Process

Not a 'Corner of the Desk' Approach

The vast majority of advisors working with other professionals manage them off 'the corner of their desk'. This means it is not organized, proactive or professional and creates the opposite impression of what we are striving for.

Your Strategic Partners will expect the experience they have with you will be similar with the experience their clients will receive from you. Why would they expect their experience to be any different from how you manage your clients? It's the only baseline they have. Therefore, we need to showcase the same level of proactive organization, professionalism, and high caliber branding we've built into your PSA Client Onboarding process. We need to build trust and establish brand differentiation – this includes exposing them to your Introduction Kit, Agendas, and PFO Binder.

Focus On Them First

We do want to point out that unlike other Advisors vying for their attention, we devote an entire meeting to learning all about *them* instead of selling them on us. This is important for a few reasons.

First, wherever you send your clients will be a direct reflection on you. You must know exactly what your clients will experience, and you need to trust that it will be great. In other words, you need to determine fit.

Second, this unique approach is simply unlike what everyone else out there is doing and for that reason, it positively differentiates you. Finally, it makes the next step of inviting them to meet at your office a natural next step in the process.

Align Them with Your Clients

If you have more than one Strategic Partner in a given professional field that is a fit, always recommend the one who is most likely to best match your client's personality and needs. Making a good "match" will enhance your value in the eyes of both your clients and Strategic Partners.

This alignment may be based on one or more of the following:

- Geography
- Speciality
- Process & Approach
- Personality
- Fee Schedule

The **Strategic Partner Checklist** on the next page will help you manage the various aspects in this process and can be automated using Maximizer to make it efficient and consistent for everyone involved.