

# What You Can Expect from this Best Practice

## PURPOSE

- To increase your awareness of the lifestyles and interests of your high value clients using the FORM concept
- To enable you to better serve these clients by understanding their needs, desires and goals
- To gain, store and use knowledge about your high value clients that your competitors do not have
- To continue the shift to client-focused relationships and creating the 'wow' factor
- To get more enjoyment and sense of fulfillment from your role

## EXPECTED RESULTS

You will:

- Begin to gather FORM information about each of your high value clients: Family, Occupation, Recreation and Money
- Use this information to provide customized attention and exceptional service that exceeds the expectations of your high value clients
- Respond better to your clients' specific interests and circumstances once you have compiled all the relevant information on them
- Begin to create advocates by being more responsive to clients' needs

## ACCOUNTABILITY

You (and your assistant) will:

- Begin building a FORM profile for each of your high value clients
- Use technology to store the FORM profile so it can be used in a meaningful way to create an exceptional client experience
- Commit to creating 'wow' moments for your high value clients based on FORM
- Continually update and add to your clients' FORM profile