REALITY CHECK 4

CLIENT SEGMENTATION

Name: Click and type

Date: Click and type

Once you’ve completed this best practice, submit your completed Reality Check as follows:

* + - Complete this document with your answers.
    - Save a copy of your completed *Reality Check*.
    - Email it as an attachment to your designated support representatives.

1. What 3 attributes are used to assess the value a client brings to you and your organization? Click and type
2. How does segmentation benefit the client? Click and type
3. How does segmentation benefit you, the Financial Professional? Click and type
4. How does segmentation benefit the organization? Click and type
5. What defines your “No Fit” clients as an MFIS? Click and type
6. What types of clients will you primarily manage as an MFIS? Click and type