

# What You Can Expect from this Best Practice

## PURPOSE

- To determine exactly how many relationships you have in each of the client segments
- To make you aware of your current client profiles and the impact it has on your current and future capacity
- To clearly identify your high value clients
- To use this information to make choices which grow your business through profit and progress – not simply volume of new clients

## EXPECTED RESULTS

You will:

- Clearly identify your high value clients so you can spend more time with and become more accountable to this important group of clients
- Attract more high value clients by actively focusing on this group of clients
- Identify mid-tier clients with potential who you can target to become high value clients using a methodical process covered later in this program
- Identify lower-tier clients who may be better served by other financial representatives within the Credit Union to make better use of your time

## ACCOUNTABILITY

You will:

- Review the segment assigned to each client assigned to you
- Benchmark your Client Analysis annually to assess your progress
- Introduce lower-tier clients to suitable representatives in the Credit Union to free up your capacity to bring on and serve more high value clients