

FUTURE FORWARD Webinar Event

Advisory, Analytics, & AI



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SEPT. 24 & 25

Earn CPE



Client-Centric Service Models: Optimizing Advisory Services for Maximum Value

By Vanessa Vasquez

Agenda

- ☑ Learn techniques for identifying and understanding the unique needs and preferences of your clients.
- ☑ Explore the latest technologies that enable personalized client interactions and customized advisory solutions.
- ☑ Provide frameworks and best practices for developing client-centric service models that align with your firm's strengths and capabilities.

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VANESSA VASQUEZ

- 🕒 **Homeschooler Mom** of Two Geniuses
- 🕒 Committed to Inspire Entrepreneurs to **Create a Living Legacy**
- 🕒 **Top ProAdvisor** of the Year
- 🕒 MBA Financial Accountant, Business Consultant, Systems and Processes Strategist, **Educator**, and Public Speaker
- 🕒 **Content Creator** for Firm of the Future, CPA Academy, Negozee, AltAccountant, Insightful Accountant, and Member of the Woodard Writers Coalition
- 🕒 Creator and Producer of **Conferencia F.I.T.**, a conference on Finance, Innovation, and Technology for the Hispanic/Latino Community



POLLING #1

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“What new technology does is create new opportunities to do a job that customers want done.”

Tim O'Reilly

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Understanding Your Clients' Needs



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Why Understanding Client Needs Is Critical

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Techniques for Identifying Client Needs



- ✓ Active Listening and Communication
- ✓ Client Surveys and Feedback Forms
- ✓ Client Analytics and Data Insights
- ✓ Segmenting Clients
- ✓ In-Depth Client Interviews

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Your Clients identify you as a Value Advisor:

- 1) **BEST IN CLASS:** A subject matter expert
- 2) **Builds and maintain TRUST:** Consistent and Transparent
- 3) **SHARES** their knowledge: Communicates Abundantly
- 4) **VALUE** creation is the top priority: Understands the needs

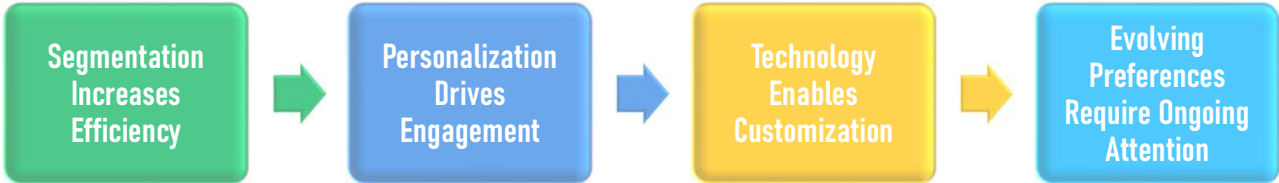


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Identifying the Clients' Needs



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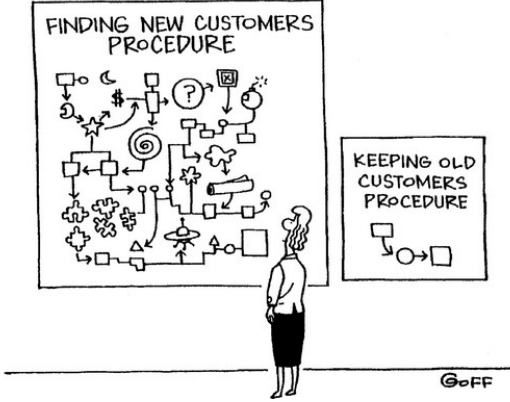
“The key to great client service is recognizing that each client has unique needs. Once you understand their preferences, you can deliver solutions that feel custom-made, building trust and loyalty.”

- John Maxwell

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Leveraging Technology for Personalization



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Automation in Advisory Services is...



Leveraging automation tools to streamline tasks such as financial reporting, tax compliance, budgeting, and data analysis, allowing advisors to focus on strategic, value-driven client conversations.

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Automation in Leveraging Clients Services



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Implementing Tech-Driven Advisory Solutions

What technology are you currently using to enhance client interactions?

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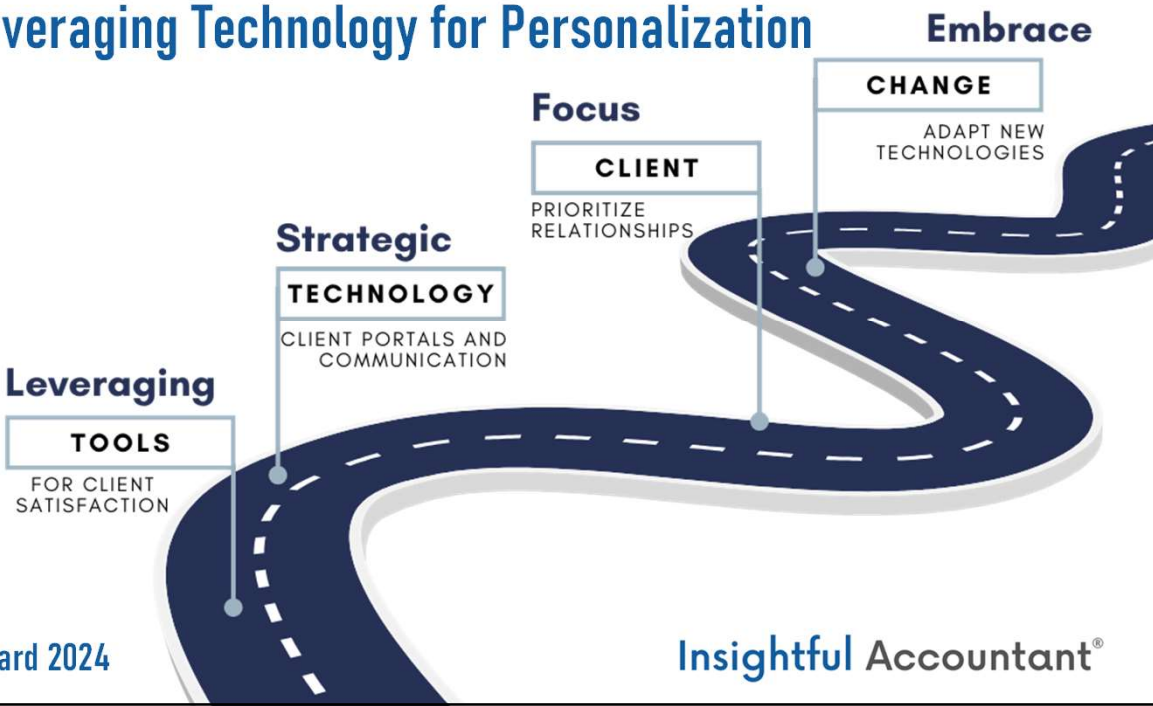
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Mastering Client Satisfaction

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Path to Leveraging Technology for Personalization



POLLING #2

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Developing a Client-Centric Framework



A "peace of mind" strategy adds to the customer experience!

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Client-Centric Service Model

A strategy designed to prioritize and address the unique needs and preferences of clients, ensuring that all services delivered are aligned with their goals and expectations.



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Create a Real Experience
Create a Real Relationship

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Journey to Real Client-Centric Experience



- ✓ Start your journey by deeply understanding who your clients are, what they value, and how you can deliver beyond their expectations.
- ✓ Ask probing questions about their goals and challenges, showing genuine interest in their success.

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Some Questions to Start with...

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Some Questions for a Real Relationship

- 1) What principles are non-negotiable for you in your business or personal life?
- 2) Which milestones would make you feel fulfilled when you look back in the future?
- 3) What impact do you hope to have on the people who work with you or for you?
- 4) What bold steps are you willing to take to achieve extraordinary results?
- 5) What advice would you give to your younger self or future generations?

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Create Value at Every Touchpoint

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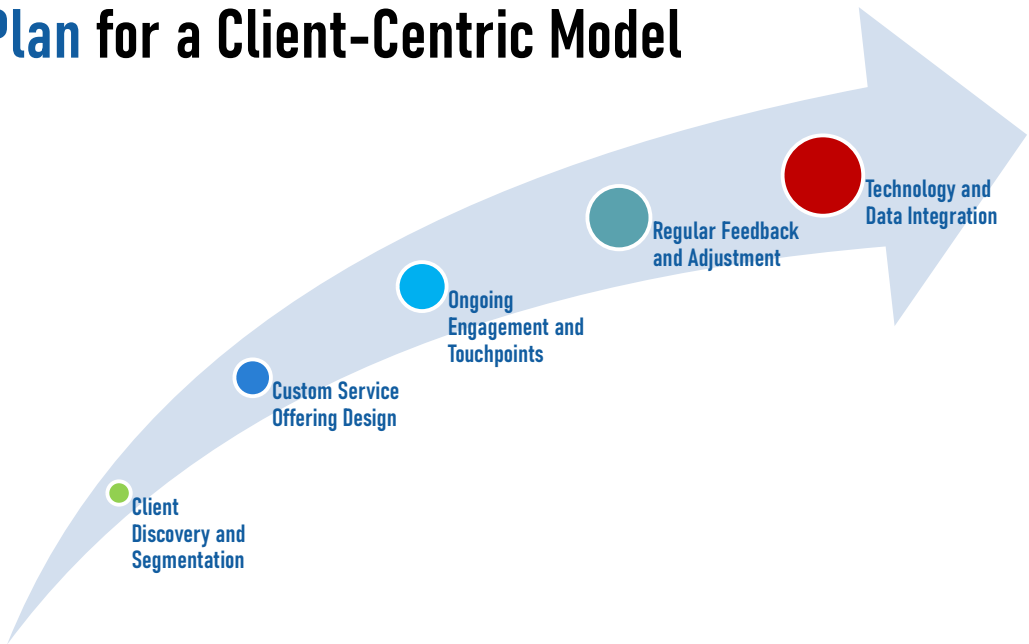
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As client needs evolve, so should your services. Use feedback, technology, and client data to continuously improve.

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Action Plan for a Client-Centric Model



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Persuasive Journey to **Client-Centricity**



- Start with Understanding
- Build Trust through Customization
- Engage Regularly, Even Without Prompting
- Iterate and Improve

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“The part that is highly appropriate and where your value really appreciates is your Unique Knowledge of that person’s circumstances. Your UNIQUE KNOWLEDGE of what that person is trying to achieve.”

Phil M Jones

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POLLING #3

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Thank you! Questions?

(Hablamos español)

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