

ADVISORPOWER: CUSTOM GROWTH PLANS<sup>SM</sup>

## ReferralPower: A Step-by-Step Map to Your Best Opportunities<sup>SM</sup>

Creating highly satisfied and loyal clients is the easiest way to access the most valuable leads of all: referrals. ReferralPower will put you on the right path.

### HOW YOU BENEFIT

After Excella's 12- to 14-week expert consultation, your firm will be able to do the following:

- Understand how to assess client needs and measure satisfaction
- Implement a custom-designed program to improve client satisfaction
- Identify your best potential referral sources
- Implement the custom referral program designed by Excella

### WHAT EXCELLA WILL DELIVER

- An evaluation on your clients' satisfaction, based on a comprehensive survey we conduct on your behalf
- An action plan for improving client satisfaction, including advice on implementing our recommended next steps
- A list of your best potential referral sources
- A customized and actionable referral program, including specific strategies, tools, and training to help you ask for referrals from your target candidates

Excella will also provide financial advisors with ongoing coaching and support for a mutually agreed-upon period of time.

### HOW WE WILL COLLABORATE

To maximize ReferralPower, we will ask that you collaborate with us in the following ways:

- Participate in biweekly conference calls
- Complete questionnaires and worksheets we provide to facilitate information gathering
- Allow us to send an online survey to your clients
- Review and provide timely feedback on the deliverables we create for you

### GET STARTED TODAY

Contact Ani Yessaillian at 617 886-6001 or [AY@excellamarketing.com](mailto:AY@excellamarketing.com).