



ENGAGEMENT ESSENTIALS

The Engagement Essentials Programme, from AbsoluteEngagement.com, is a powerful vehicle to help you design a client experience that is not only meaningful, but lays the foundation for deeper client engagement and profitable growth.

By executing on five well-defined actions you will ensure you have the right offer, for the right clients, delivered in a way that is clearly understood and valued by clients. The programme is self-paced and includes all tools and resources you need to take action.

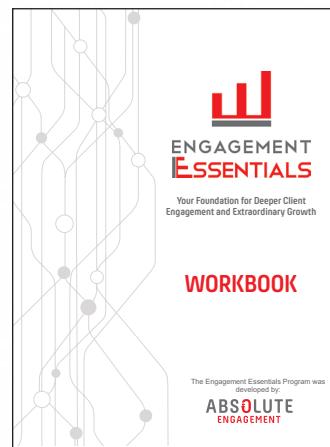
What You'll Accomplish

By working through our step-by-step plan you will:

- Define the clients who are right for you
- Segment your clients based on real value
- Ensure you are delivering the right offer to the right clients
- Assess capacity and profitability
- Manage client expectations

What You'll Get

- Access to a dashboard for all content and reporting
- A personalised reporting tool to assess your business and run scenarios
- Step by step instruction
- Tools to take action



You can learn more, and view a 3-minute introductory video by [clicking here](#).



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Engagement Essentials Course Outline

The Engagement Essentials Programme is built around the 5 Actions that will ensure your client experience is defined, consistent and created to drive growth.

The Action	The Steps	The Outcome
Define Your Ideal Client	This Action is about reviewing your existing clients and assessing what is most important to you in order to define your ideal. From there you'll establish client acceptance criteria and define a process to assess the fit of prospective clients.	By defining your ideal client, you can craft a client experience that reflects what is important to your best clients and ensure that you are working with clients who energise and inspire you.
Segment Your Clients	This Action is about defining (or refining) a segmentation model that reflects true value, rating your clients and establishing a process to ensure that ratings are always up to date.	By segmenting your clients, based on the value they deliver, you can link the value of the client to the scope of service they receive, the first step in defining an offer that is both meaningful to clients and profitable for your business.
Define Your Offer by Segment	This Action is about defining the scope of service that you will deliver to each client segment and assessing your ability to deliver on that experience with existing resources.	By defining and assessing your offer you can ensure you are investing appropriately in each client segment, laying the groundwork to analyse profitability and communicate your value.
Assess Profitability	This Action is about assessing the cost of delivering the offer that you outlined in the previous step, including direct, indirect and time costs by segment.	By assessing profitability, you can ensure that the offer you have defined is not only right for your clients but right for your business.
Communicate Your Value	This Action is about mapping out a process to communicate and reinforce your value to existing and prospective clients.	By communicating and reinforcing value you will ensure that your clients are fully aware of everything that you provide, creating deeper engagement and setting the stage for growth.



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The Faculty



Julie Littlechild

Julie Littlechild is a speaker, author, researcher and Founder of AbsoluteEngagement.com.

Julie has worked with and studied top producing advisers, their clients and their teams for twenty years. She is a recognised expert on driving deeper engagement and growth and the author of a popular blog. She sat on the national board of the Financial Planning Association from 2010 – 2013, was twice identified as one of the 25 Most Influential People in Financial Planning by Investment Advisor Magazine and won the Influencer Award in practice management from Financial Planning Magazine.



Reema Baber

Reema Baber is the Director, Programmes and Development for AbsoluteEngagement.com.

Reema is responsible for managing the programmes that the firm offers and developing and expanding a platform designed to help advisers achieve Absolute Engagement. She has extensive experience helping advisers use client research to strengthen client relationships and grow their businesses. Reema has worked directly with hundreds of advisers and their organisations across the U.S., Canada and UK, providing consultative support and education.