

# Refresh and revive your value proposition as an adviser

Rejuvenating your value proposition, says Anton Swanepoel, independent trainer, consultant and author, means transforming it into something confident, successful and more exciting.

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First, he says, know what your value proposition actually is. Why does your value proposition matter? How do you write and articulate your value proposition?

Some thoughts about what a value proposition is (and isn't) and why it matters

- Your service offering as a financial service provider (FSP) is not your value proposition. And importantly, the *Six-Step Financial Planning Process* is different to the *10-Step Process of Professional Client Engagement*.
- On the one hand is the activity that *demonstrates* your value proposition and on the other hand is your back office that *supports delivery* of your value proposition.
- Around 80% of your value proposition is seen and lived through by your client. It talks to your client's experience when doing business with you.
- The more successful you are in your client engagement, the more income you are likely to generate from your business with clients – the existing ones as well as the ones that are referred to you.
- Your value proposition is the way that you communicate how you bring value to your client.
- What makes one FSP more successful than another ultimately is about client engagement, what attracts clients and what retains them.
- The purpose of your business – and the crux of your value proposition – is to create and keep customers. Your value proposition must challenge you – it requires you to seek knowledge beyond the norm; keeps you at the forefront of your game and puts you at a great competitive advantage. Your value proposition answers these questions for your clients:
  - 'Why should I do business with you?'
    - 'What do you offer that your competitor doesn't?'
- Your value proposition matters as all financial advisers have a need for a competitive

advantage. Without a competitive advantage, you can't compete.

Anton cautions against competing on price. If that is the case, you will become no more than a commodity.

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