




GREENE
CONSULTING

Creating Client Engagement: The Rapid Planning Process

A Process that Creates
Differentiation and Drives
Growth



Create Client Engagement

If the traditional approach to planning requires 12 hours to complete, it is clear that Advisors are unable to scale this process to the entirety of their clients. And with “Planning” being increasingly defined as a core element of the wealth management client experience, the challenge is how to scale the delivery of Planning to ensure it can be delivered to ALL clients.

The Rapid Planning Process provides Advisors with clear and practical guidance in transitioning from the traditional long-cycle planning process to the delivery of a “Digital Experience” that can be effectively scaled to the unique needs of each client and delivered in the context of a singular client interaction.

Employing the Rapid Planning Process will enable Advisors to:

Compress the Time to Value

Enables Advisors to deliver tangible value through a collaborative planning process in just one meeting

Create Clear Differentiation

Equips Advisors with a structured framework for delivering a differentiated client experience

Drive Growth

Identifying clear opportunities for Asset Consolidation

Program Content

The Rapid Planning Program is comprised of three (3) one-hour webinars that equip Advisors with a clear understanding of the The Rapid Planning Process and the ability to employ it using your financial planning software. Following is a detailed overview of each component of the Program.

WEBINAR #1



Capitalizing on the Power of the "Rapid Planning Process"

The Rapid Planning Process provides Advisors with a new way to engage clients in a scalable, efficient planning process. This session ensures Advisors have a clear understanding of the rationale behind the Rapid Planning Process and an outline of the five (5) key steps of the process. Additionally, Advisors are equipped with an effective approach for motivating clients to engage in the Process. Key topics covered include:

- > Examining the Metrics of Traditional Financial Planning
- > Changing the Paradigm: Rapid Planning vs. "Traditional Financial Planning"
- > Delivering a Goals-Based Client Experience
- > Positioning the Rapid Planning Process to Create Client Engagement
- > Focusing on the Three (3) Key Questions every Client Must Answer

WEBINAR #2



Employing the Rapid Planning Process with Clients

While simple in construct, the Rapid Planning Process is a paradigm change for Advisors accustomed to engaging in the traditional long-cycle planning process. In this session, Advisors are equipped with the ability to effectively lead the Rapid Planning Process to deliver immediate and tangible value to the client and identify potential opportunities to deepen the relationship. Key topics covered include:

- > Activation: Activating Clients on the Planning Platform
- > Facilitating the Priorities Conversation in the Software
- > Collaboration: Leveraging the Software to Deliver a Fast-Paced, Collaborative Planning Experience

WEBINAR #3



Monetizing the Process through Aggregation and Consolidation

The Rapid Planning Process delivers immediate value to clients, but what about for the Advisor? Employing the process will generate higher levels of client loyalty and create opportunities to consolidate assets held away. In this session, Advisors are equipped with a clear message for why clients need to Aggregate both financial and non-financial information and how Aggregation will empower clients to more effectively manage their wealth. Additionally, the session addresses specific strategies for making a rational case, in the best interests of the client, for Asset Consolidation. Key topics covered include:

- > Re-Defining Aggregation: Going Beyond Financial Account Aggregation
- > Addressing the Three (3) Common Objections to Aggregation
- > The Consolidation Conversation: Making a Powerful Case for Asset Consolidation

Employing the Rapid Planning Process to
Create Client Engagement

Support Resources

In addition to the three Rapid Planning Process Webinar series, the Program also includes a series of Leader Guides that enable Managers to coach and reinforce the implementation of the Rapid Planning framework.

Additionally, Advisors are provided clear Reference Guides that ensure they can effectively execute the Rapid Planning Process using your firm's Financial Planning software.

To learn more about The Rapid Planning Process and the three-part Webinar series, contact us at 404-324-4600 or reach out via e-mail to one of our Senior Executives:

dangreene@greeneconsults.com
rickswygman@greeneconsults.com
davidgreene@greeneconsults.com



www.greeneconsults.com
www.financialplannerprogram.com
404-324-4600