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**Value Proposition** worksheet

DESCRIPTION/INSTRUCTIONS:

*A value proposition is a clear statement that explains how your unique approach and services can help your clients. By clearly stating the purpose, for both you and your clients of the work you do, the decision each client makes to work with you will be easy. A value proposition will help you articulate:*

*1. Your ideal client and how your firm is uniquely positioned to help with their financial needs (resonate).*

*2. How you will deliver specific services and benefits designed to help solve their challenges (differentiate).*

*3. Why clients should work with you, rather than someone else (substantiate).*

*4. The outcome of the work that you will do with and for your clients (key benefits).*

*This worksheet will help you think through and capture the elements of a well-defined value proposition. Refer to the* ***Value Proposition Vocabulary*** *at the end of this worksheet to help you complete the exercise.*

***Instructions:***

*Review each statement or question and example and write up to three description/answer statements.  
Of the description statements you write, circle the one you prefer and use your circled description statements to capture your value proposition.*

*See the examples on page 2 to help you get started.*

**Value Proposition Examples**

# Example 1:

**We work with single female executives who have the know-how but not the time or desire to deal with the various aspects of their financial lives.** (Target Client/Statement of Need)

**We take the time to learn your values and vision of what financial success means to you and we use technology to consolidate and present a clear overview of all the moving pieces of your financial life.**

(How we Solve for your Problem/Our Differentiator) achieve

**Our firm will help reinforce all of the positive choices you have made and will continue to make in your lifetime.** (Key Benefits)

# Example 2:

**We work with clients who have spent their professional careers committed to building stronger communities. As leaders in their chosen industry, they have followed their passions and spent countless hours in an effort to reach their current level of financial success. For many, the question now is, *“How do I manage, guard and protect what I have worked so hard to achieve?”***

(Target Client/Statement of Need)

**As business owners, we understand the diverse needs and concerns of our clients. From complicated regulatory rules, risk evaluation and liquidity needs to the management of appreciated assets, philanthropic planning and donation strategies, it can often be a maze of choices and decisions. We believe highly complex situations require highly trained professionals - who can go deep and really understand the specific concerns and ensure that the strategy set forth not only addresses the client need but also aligns with their overall philosophies and beliefs.**

(How we Solve for your Problem/Differentiator)

**We understand the devotion it takes to reach this level of success and we are as invested in our clients as they are to theirs.**  (Key Benefit)

**Value Proposition worksheet**

# Who is your target client?

**List profiles for three target clients.**  
For example: *People enjoying their retirement, People approaching retirement, Busy sales professionals*

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***Circle the best one.***

# Statement of Need, Frustration or Financial Problem

**List the types of problems or frustrations that may be experienced by your clients.**For example:

* *Frustrated with attempts to generate income by low interest rates and volatile financial markets*
* *Concerned that certain strategies will not produce the growth they need to fund* their retirement
* *Want to protect their loved ones from the unique risks of frequent business travel*

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***Circle the best one.***

# Statement of How We Can Help You Solve Your Problem

**List how you can help solve your clients’ needs, frustrations or financial problems.**  
For example:

* *Can help you protect your capital, generate income and minimize taxes to provide you with the income you need from your investments to live your desired lifestyle*
* *Will help you identify alternative investment solutions to get you back on track to your retirement goals*
* *Will help you develop a plan to achieve financial independence for you and your loved ones*

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***Circle the best one.***

# Statement of Principles and Philosophies

(see Value Proposition Vocabulary)

**What do you believe? List out your top three.**For example:

* *We believe that the fiduciary status is not just some government regulation; it is a promise that we have always made to every client to provide them with the highest level of care possible.”*
* *That investors across America may continue to be disappointed by unpredictable investment markets and fall short of producing the income they require to live the retirement lifestyle they had planned by following pre-2000 investment approaches.*
* *Planning for the financial independence of your family can be structured to accommodate the schedules of busy executives by using technological innovations so you always know where you are today, where you and your family hope to be in the future and how you plan to get there.*

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***Circle the best one.***

# Statement of Key Benefits

(see Value Proposition Vocabulary)

**List some ways in which people who meet your target client profile benefit by working with you and your firm.**For example:

* *Generate consistently high levels of investment income, minimize volatility and clearly understand and avoid risks that may erode your capital.*
* *Properly diversify your investment portfolio against unnecessary risk so you can gain peace of mind as you look forward to a happy and successful retirement.*
* *Be able to provide for your family today and in the future, knowing that your family will be well cared for under any circumstances.*

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***Circle the best one.***

# Building your Value Proposition

**Pulling from all the components above, complete your Value Proposition Statement below.**

|  |  |
| --- | --- |
| ***For*** *(target client)* |  |
|  |  |
| ***Who****(what do they struggle with)* |  |
|  |  |
| ***At*** *(firm name)* |  |
|  |  |
| ***We believe*** *(how you solve for client struggle /philosophy)* |  |
|  |  |
| ***We can help you solve this by*** |  |
|  |  |
| ***By working with us, you will*** *(overall client benefit)* |  |

Value Proposition Vocabulary

# Attributes of the firm and its employees

Able Accomplished Accountable Active  
Adept  
Advanced Business owner Capable Competent Comprehensive Credible Developed Devised  
Educated Entrepreneurial

Excellent Executed Executive Exemplary Experienced Expert Extraordinary Focused  
Formed Formulated Global  
Highly trained Implemented Incorporated Initiated

Instituted Intellectual Intelligent  
Knowing Knowledgeable Leadership Logical  
Mastery  
One-of-a-kind Outstanding Oversaw  
Owner  
Partner  
Perceptive Planned

Practiced Premier  
Prepared Proactively Produced Professional Proficient Proprietorship Qualified Responsible Savvy Shareholder Sharp  
Skillful  
Smart

Spearheaded Specialize in Staff  
Star performer Stakeholders Supplier Talented  
Team  
Teamwork  
Trust Trustworthy Unparalleled  
Up-to-speed

Wealth mgmt specialists

# Benefits to the client

Achievement Add Value Advance Affordable Appreciation Attained Awarded  
Benefit  
Boost  
Bottom Line Capitalized Competitive Complete  
Comprehensive Conservative Conserve Consistent  
Create Wealth Credible  
Customer- Oriented  
Customize Decrease

Deduct  
Delivered  
Earn  
Enhance  
Estate Planning Exceed  
Excel  
Expand Expectation Expedited  
Extend  
Finances  
Finish Ahead Fortune  
Funding Furthered

Gained

Generate Prosperity

Generate Success

Generate Wealth

Generated  
Get Big Fast Goal  
Growth

Growth Potential

Guarantee Guide  
Help  
High Yields High-Earning Improve Improvement Increase Legacy Lessened  
Lifted Maximized Move Ahead Opportunity Outpace Outperform Overcome

Partnership Performance Personalized Portfolio  
Position  
Potential  
Profit  
Profitability Profitable Progress Prosperity Purpose  
Raise  
Reduce Costs Reductions Results  
Retain  
Return  
Revenue

Revenue Stream

Reward

Rewards Program

Satisfaction Save  
Secure Services  
Set Goals Specialize Succeed Support Surpass

Tailored Solutions

Tax-Efficient Investing

Transparent Value

Value-Priced

White/Blue Collar

Work-Saving Yielded

# A reason the attributes produce benefits

Accelerate Access Accomplish Accountability Accountable Accurate Achieve Achievement Acquire  
Adapt  
Adaptable Administer Advantage Advise Aggressive  
Aim  
Aligned Alternative Ambitious Analytical Analyzed Approach Arbitrate Articulate Assemble Assessed  
Astute  
Attentive  
Audited  
Authority Authorized Briefed  
Broadly Diversified  
Business Model Calculated

Capital Preservation

Careful Centralized Charter Clarified  
Clarify  
Clinch Commerce  
Communication

Composed  
Concept Conceptualize Conduct Consistency Consolidated Construct  
Consult  
Contract  
Control  
Convert  
Convey Coordinate Correspond  
Cost Structure

Counsel

Cultivate Relationships

Cutting-Edge  
Deal  
Decide  
Define  
Deliver Demonstrate Dependable Detailed Develop  
Devise Diagnose Diligent Diplomatic Directed Discuss Dispatch Division Document  
Draft  
Draw Up Economical Economy Edit Effective Efficient  
Effort  
Eloquent  
Employ  
Enforce  
Engineer

Ensured Enterprising Establish Evaluate Examine Expansion Fielded  
Finance  
Follow Through Follow Up Forecast Formalize  
Hard Work Identified Implementation Improvement Incentive

Income Generation

Independent Indispensable Industrious Informed Innovative Insightful Inspected Instrumental Integrated Interpret Investigate Itemize  
Join  
Key  
Launch  
Leading  
Low Turnover Low Volatility Management Mapped Marketplace Measure  
Merge Methodical Meticulous Milestone  
Modified

Monitor

Multiple Systems

Navigate Negotiate Network Objectivity Optimize Orchestrated Organization Organized Overhaul Partnerships Planning Precise Preferred Premier  
Price  
Proactive

Problem- Solving

Product Productive Productivity Programmed

Proven Track Record

Prudent  
Punctual  
Pursue  
Quantified Rational  
Reach Reasonable Recognize Recommended Redesigned Referral  
Refined Refocused  
Regional  
Regulate Reinforce  
Remodel Reorganize  
Replace  
Research

Resource Resourceful Restructured

Results- Oriented

Revamped Review Rework  
Safe  
Scope  
Screen Scrutinized Sector  
Serious  
Show Signature Simplified Solution  
Solve  
Stability Stable  
Standardized Strategic Streamlined Strengthen Supply Surveyed Sustained Tactical  
Take Action Targeted Tested Thorough  
Time-Saving Track  
Train  
Unique Update Upgraded Useful  
Verified  
Versatile  
Well-Oiled Well-Rounded Working

# A degree of emotion

Achieve  
Advance  
Advise  
Advocate  
Ambition  
Amplify Appreciative Approachable Attuned  
Authored  
Blocked  
Bold  
Boosted Brainstorm  
Built  
Campaigned Candid  
Challenge Champion  
Clincher  
Coach  
Committed Confidence Confident  
Conscientious Conviction Convinced Cooperative Counseled Created  
Creative  
Critiqued  
Cultivate  
Curious

Customer Care

Customer Loyalty

Daring  
Decisive Dedicated  
Design Determination Determined Discovered Discreet  
Dominate  
Dream  
Driven  
Dynamic

Ease Nervousness

Easygoing

Easy-To-Get- Along-With

Educated  
Empower  
Enable  
Encourage  
Energetic  
Enthusiastic  
Entrust  
Envision  
Ethical Excellence Explore  
Facilitate  
Fair  
Familiar  
Fight For  
Forge  
Foster  
Founded  
Fresh Ideas Friendly  
Game-Changing

Go Above and Beyond

Go the Distance

Guided  
Hands-On  
Happy  
Helpful  
Honest  
Ideas  
Illustrate  
Imaginative  
Impact  
Impressive  
Influence  
Influential  
Inspire  
Integrity  
Lobbied  
Loyal  
Mature  
Mentored  
Mobilized  
Moral  
Motivated  
Mutual Respect  
Navigated  
Negotiated  
On-Target  
Open

Open Communication

Open Doors  
Open-Minded  
Outgoing  
Partner  
Passionate  
Patient  
Persistent  
Persuasive  
Pleasant  
Positive  
Power  
Priorities  
Progressive  
Prolific  
Promoted  
Protect  
Publicize  
Quality-Conscious

Reconcile  
Reinvent  
Reliable  
Relieve concerns

Resilient  
Resolved  
Responsibility  
Revitalize  
Revolutionary  
Revolutionize  
Role Model  
Self-Made Man/Company  
Shaped  
Showcase  
Social  
Stimulated  
Stress-Free  
Strive  
Strong  
Succeeded  
Support  
Sweat  
Tactful  
Taught  
Teach  
Tenacious  
Tenacity  
Transformed  
Unified  
United  
Unwavering  
Values  
Visionary  
Willing  
Work Together  
Zealous