



## Unconventional Wisdom Turning Clients Into Advocates

Turning clients into advocates is not a simple task; it takes a plan, time, and perseverance. You have to believe in the Law of the Harvest - you reap what you sow. In other words, the principles that work on the farm also work when it comes to marketing and getting referrals. Like farming, creating advocates is hard work!

### Step 1: Prepare the Ground

Before you can start planting your farm, you must prepare the ground. If you wanted to plant lettuce, tomatoes, and cucumbers, would you just throw them out on the ground and hope something grows? NO! You have to work the soil, fertilize it, pull up the weeds, determine the amount of sun each vegetable prefers, etc. – everything necessary to provide the best foundation for your plants to grow. This also applies to turning your clients into advocates. You must do some research on what it takes to achieve your goal, and then develop an action plan. We created the Referral Builder System to give you a step-by-step plan on how to implement a client loyalty plan in your business to create more advocates for your business.

Most, if not all, financial advisors have been through sales training at some point in their careers. The first thing they teach you in sales training is the sales process. The sales process is designed to turn prospects into clients. Few, if any, advisors have been through loyalty training. This is unfortunate because having a clearly defined loyalty process is exactly what it takes to turn clients into advocates. Your marketing resources (time and money) will have a greater impact on your business if you invest them in turning clients into advocates.

### Step 2: Plant the Seeds

If you till the ground but never plant the seeds, nothing will ever grow. "Planting" in your business is DOING something about your plans and goals. It means taking action. You can never know if the seed you have is going to grow unless you plant it. To turn clients into advocates, you must make deposits of time. Plant seeds by inviting them to lunch, not to talk business, but to talk about how they are doing. Exceed their expectations. Do special things for them, things that they never expected. Take an interest in them and the things they like.

### Step 3: Patience and Persistence

You must give plants time to develop and grow. Just because you don't SEE anything happening doesn't mean roots aren't growing. The same thing applies to your clients. Just because you've gone to a few lunches and made a few phone calls doesn't mean your pipeline will be full of referrals in a few days; it may take weeks, even months. So often people give up way too quickly because they think that the plan isn't working when in reality, they really haven't given it enough time to work. It is important to have patience and persistence when implementing a plan with a clear vision. Don't just go from one approach to another on a whim. If you have a long-term view of what you want your garden to look like, you will be more patient in giving things time to grow.

### Step 4: Nourish the Plant for Continuous Growth

Just because you are patiently and persistently planting seeds, you can't just sit back, relax, and wait for the harvest. There's still more work to be done. You need to fertilize the plant to ensure it will grow stronger. On a sunny, hot day, if you neglect to water your plant it will cause it to wilt and die. You need to continually nourish the plant so the roots will grow deeper into the ground. The same goes for your clients. The more time you spend with your clients and the more interest you take in their lives, the deeper the relationship will become and the more advocates you will build. The extra attention that you pay to your clients brings more worth to the relationship and helps to distinguish you from your competitors. Many



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financial advisors today struggle with the challenge of differentiating themselves from their competition. If you truly believe that you are in a relationship business, I offer this advice:

### **Bet the farm on your relationships!**

The next time someone asks you what makes you different, your response should be:

**"I build the best client relationships on the planet!"**

The good news is that if you deliver on this promise, you won't have to say this to anyone. Your clients who are on the receiving end of these relationships will say it for you. That is the secret to getting more and better referrals. It is also why you should want to turn your clients into advocates. In a world characterized by rapid change and unmet expectations, people everywhere are searching for this type of relationship. Your clients and prospects value their relationships with you more than you might imagine. You should never underestimate the power of your relationships. You must have the conviction that investing your time to become a stronger advocate for your clients will in fact produce more advocates for you.

### **The Paragon Principles of Advocacy**

1. Advocacy begets advocacy. When you become a stronger advocate for your clients, they will become stronger advocates for you.
2. Advocacy is a function of loyalty. You create advocates by building loyalty.
3. You build loyalty by adding tangible value.
4. You add tangible value by solving problems. The more problems you solve, the more value you add to the relationships with your clients.
5. You solve more problems by getting to know your clients on a deeper level. When you get to know clients on this level, you uncover break-through insights about them and their families.
6. You get to know your clients on a deeper level by spending more quality time with them.
7. What you say matters little. It is what you do that counts. Actions speak louder than words.
8. In a relationship business, those who build and maintain the best relationships will be the most successful.

By continually comparing your plans and goals to the "sowing and reaping" analogy, you can gain further insights into how to build client advocacy.

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\* *The Referral Builder™* is a turnkey system for turning more of your Key Clients into Advocates. Advocate-based marketing system that helps investment professionals get more referrals from key clients and centers of influence. Comprehensive system includes everything (scripts, worksheets, samples, forms, etc.) you need to implement a powerful referral program in your business by turning your clients into advocates. System includes two workbooks - Story Builder and Advocate Builder, Master Forms and Audio CD.

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