Implementation & Workflows

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January 2018

Questions to Ask to Get Started

- **When to assess?**
  - When do you want/need information about your prospects or clients?
  - Prospects: Get to know them in advance
  - New clients: Establish foundation based on objective measures of financial strengths & weaknesses
  - Current clients: Introduce new concept and service offering

- **How will you use the assessment results?**
  - Use results in ongoing discussions, or simply to provide a leave-behind (e.g., the client report)?
  - Will you create behavioral plans?

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When To Assess

Prospective Clients

- Marketing lead generation
- Getting to know prospective clients
- First contact: before introductory meeting

Onboarding

- Getting to know clients: Homework
- Delivering results and discussing implications in first meeting(s)
- Ongoing? Creation of plans based on results

Current Clients

- Introduction of new approach/resource
- Opportunity to discuss attitudes at next meeting or check-in
- When new significant other comes into picture

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How to Use Results: Three Levels

Identify

- Know in advance
- To prepare for the relationship

Interact

- To be more effective in counsel
- Work with couples
- Educate clients

Impact

- Coaching & development
- Create, monitor behavioral plans
- Segment clients

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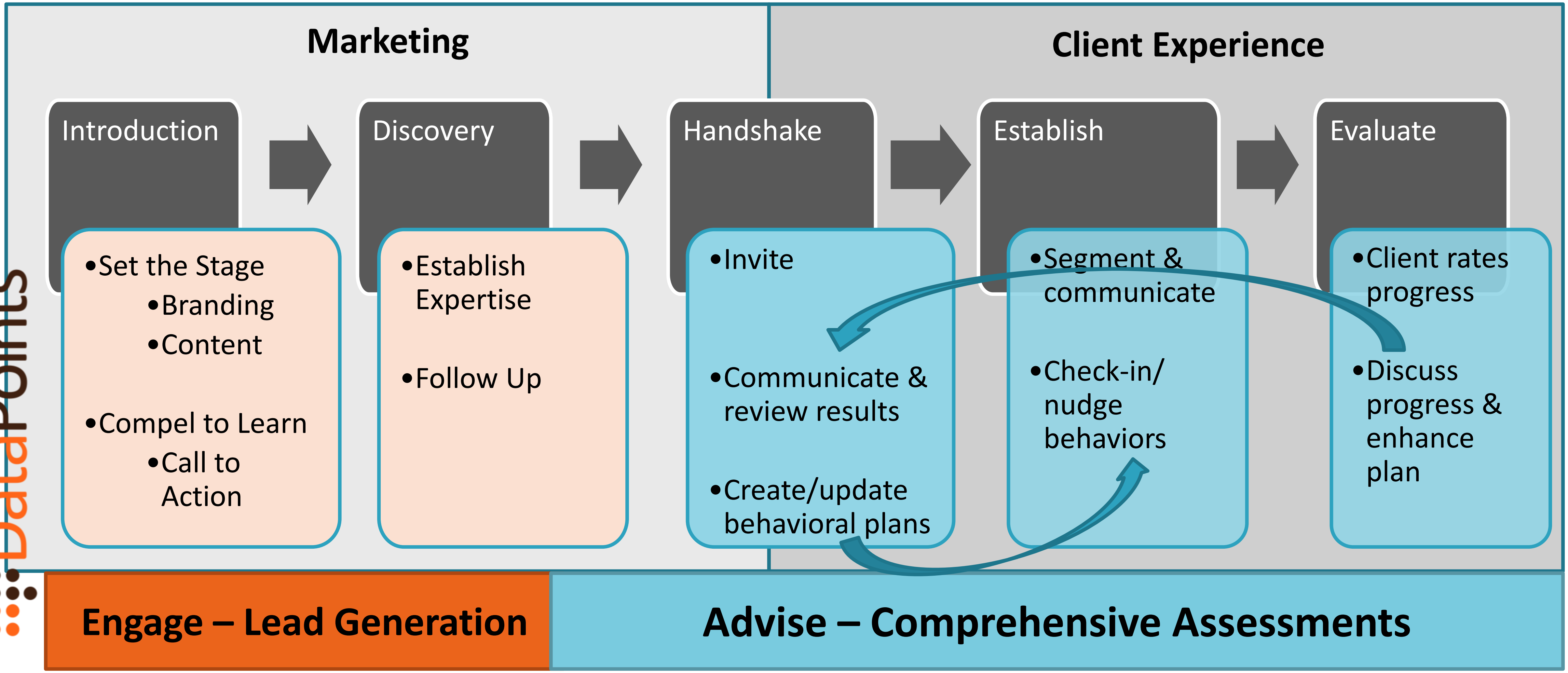
General Workflow Framework



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How To Add DataPoints: Basic Steps for Prospects

Set The Stage

- Demonstrate your knowledge and focus on behaviors & improvement through website, marketing content
- Set the stage for visitors/ prospects

Compel to Learn

- Select Engage test that compliments content/ expertise/ branding
- Create a call to action that is clear, and related to the content

Establish Expertise

- Redirect visitors to a page the logically follows the Engage test
- Follow up with an invitation to take an Advise test

Follow Up

- Not interested?
  - Add to mailing list
- Interested?
  - Invite them to complete Advise test
  - Follow up with introductory meeting

Sample Workflow:
Prospective Clients (Engage & Advise)

Set The Stage

- Webpage content with information on financial behaviors
- Blog/article good financial behaviors for financial health

Compel to Learn

- Logically embedded link to take test
- One, clear call to action and button on the content page/ landing page
- Clear call to action via popup on side/below
- Social media marketing campaign

Establish Expertise

- Once the prospect take the test…
  - Redirect visitors to a more information page about your work with clients & financial behaviors
  - Follow up with an invitation to take Building Wealth (can add this automatically)

Follow Up

- Not interested?
  - Add to mailing list/drip campaign for resources/ articles of interest
- Interested?
  - Invite them to take Building Wealth
  - Follow up with 30 minute introductory meeting

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Sample Workflow: Prospective Clients (Advise)

Set The Stage

- Stage setting branding (see previous workflow)
- Introduce Building Wealth
  - Send client overview with intro
  - Describe process on website

Compel to Learn

- Send Building Wealth invitation
- Follow up in 5 days if no response
- Doesn’t take test? Add to drip mailing list with articles of interest

Establish Expertise

- Review results in in-person/ virtual meeting
- Discuss strengths/ weaknesses & how behavioral change can improve & maintain behaviors
- Create Plan

Follow Up

- Not interested?
  - Add to mailing list for resources/ articles of interest
- Interested?
  - Begin focusing on behaviors through Plan

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How to Add DataPoints:
Basic Steps for Client Onboarding

Set The Stage

- Demonstrate your focus on behaviors & improvement through website, marketing content
- Send new client overview of test

Compel to Learn

- Invite client
- Later: invite to rate behavioral plans

Establish Expertise

- Communicate & review results
- Create/ enhance behavioral plans

Follow Up

- Check-in/ nudge behaviors
- Discuss progress & enhance plan

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Sample Workflow:
Client Onboarding with Financial Perspectives

Set The Stage

- Demonstrate focus on assessments through branding; blog content on attitudes towards financial planning
- Send new client overview of test

Compel to Learn

- Invite client to complete assessment as part of homework
- Follow up in 5 days if no response
- Doesn’t take test? At next meeting, show a sample report so client can see types of information he/she will receive

Establish Expertise

- Set aside 30 minutes to review results (see Advisor Guide for sample questions for you to ask new client)
- Challenge areas? Add one or two behavioral recommendations for first 3 months to work on

Follow Up

- Ongoing: Check-in/ nudge behaviors
- Discuss progress & enhance plan
- If Plan wasn’t created, check-in on challenge areas with general follow up questions

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Questions?

- Email us at support@datapoints.com