

How to tell your brand story in 10 seconds



Most advisors waste opportunities because they don't have a clear message. The 10-Second Brand Story formula clarifies their message so they attract more prospects.

When somebody asks what you do, what do you say?

Follow this simple formula so you can master your brand story every time. Avoid someone tuning you out.

1	2	3
Identify the client's problem	Explain your plan to help them	Describe a successful ending to their story

CHECKLIST

- Are you hitting the mark with my brand story?
- Can you say it easily?
- Is it conversational?
- Is it relevant and repeatable?
- Does your entire team know your brand story like the back of their hand?

Part 1: What is the client's problem?

Every story is about someone who is trying to solve a problem. There's always an obstacle between the hero and what they need in order to be successful.

Ask yourself:

- What do I know about the demographics of my ideal client?
- What are the client's external problems (what roadblocks are they encountering)?
- What is the root cause of the client's challenges?

Tips:

- Be specific.
- Address a pain point.
- Choose a desire relevant to basic human needs.

Examples:

- A business owner has no boundaries between business and personal finances.
- A client wants to leave each of their children an inheritance that is fair – but not necessarily equal.
- A high-net-worth family may lose a large portion of their wealth to taxes.

Part 2: What is your plan?

Present your plan in a new way that relates to the problem at hand. Don't overwhelm clients with technical information – it should be easy to understand. It has to be a brief headline.

Ask yourself:

- What do clients want?
- What do I offer clients?
- What are clients' external problems that I can help remove?

Tips:

- Make it easy to understand.
- Keep it brief.
- State the plan, don't explain it.

Examples:

- Excellent client experience.
- Innovative and comprehensive solutions.
- Empowering clients to make the best decisions about their wealth.

Part 3: Create a successful ending

This is where you paint the successful ending, the before and after picture – the final destination.

Ask yourself:

- What do clients have after working with me that they didn't have before?
- How might they be feeling?
- What kind of transformation could we expect to see in their lives from working together?

Tips:

- Offer a vision of the client's life after they engage your services.
- Be specific, be clear.
- Think: We help take people from _____ to _____.

Examples:

- Helping you have peace of mind about your finances.
- So you can achieve the retirement you envisioned.
- We help you give less of your wealth to the government so you can give more of it to your loved ones.

Tie it together – Craft your brand story

Example	Problem Without the right help, wealthy Canadians may lose a significant percentage of their life's earnings to taxes.	Example	Problem Most successful business owners don't realize how much tax is being taken out of their corporation until it's too late.
	Plan Our firm guides you through an effective process,		Plan Our multidisciplinary team will help you conserve your capital,
	Success So that you can keep more of your money in your family.		Success So you are in control of where your life's wealth goes.
10-second brand story			