

Open doors with the Relational Segmentation Worksheet

Habits of highly effective financial professionals

Identifying opportunities within your network

Within your book of business, you may have more opportunities than you realize. Getting to know clients on a personal level can open up new ways to meet prospects with similar interests. To find quality prospects like your clients, you need to uncover the clubs and associations in which your clients network.

Use this proven process to discover new groups and vertical markets

Step 1

Identify 12–15 of your best clients who

- View you as their financial resource
- Are happy with the work you do on their behalf
- Are active members of the community

Step 2

Call those top clients to learn more about their groups and organizations and list your findings on a blank Relational Segmentation Worksheet (see sample on back page).

Step 3

Use the following script when contacting them

- We like to know more about our clients so we can better serve you and others like you.
- To help us focus our service efforts and marketing activities, I have two questions for you:
 - Which organizations do you belong to that support your (industry, profession, interests)?
 - What are the recreational, charitable or civic organizations you're involved with?

Tip

Be sure to get exact names and locations of the groups your clients tell you about.

Step 4

Select up to six groups where your best clients are active. Research these to find prospects that fit within your business model.

Step 5

Lastly, choose two groups where you can best focus your marketing and prospecting efforts.

Relational Segmentation Worksheet

Below is a sample of a completed Relational Segmentation Worksheet.

Tip

When creating your worksheet, the more complete your information, the more choices you'll have.

Name	Occupation and business	Business organizations	Clubs and activities	Religious and charitable groups
Bob A.	Partner, Green Builders Group	National Golf Instructors Association; Green Building Council	Travel Adventures, LLC	Habitat for Humanity; Rotary Club Activities Chair
Janice W.	HR Director, Kids Care Foundation	National Association of Women Business Owners	Running, yoga, fitness	SPCA (Society for the Prevention of Cruelty to Animals); Big Sister volunteer
Sandy B.	Retired real estate investor	Springfield Alumni Association; National Council for the Arts	Bridge club	Director, County Arts Group
Martin W.	President, Hyde County Chamber of Commerce	Director, Thompson Bike Tours	Bayfront Fitness; travel	Temple Beth Shalom; Rotary Club
Tom D.	Architect	American Institute of Architects	Coach, Tiger Travel Soccer Club coach	Emergency fire volunteer

Getting involved goes a long way

Immersing yourself into the organizations that your clients and prospects are involved with can give you critical insight, new connections and opportunities, and help grow your business.

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