

# A checklist to help uncover new markets and opportunities

## Habits of highly effective financial professionals

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Using this checklist, together with the Relational Segmentation Worksheet, can help you identify new markets and target groups. It's an opportunity to meet new prospects and gain referrals.

### Get involved in the same organizations as your clients

Once you've segmented your top 12 – 15 clients using the Relational Segmentation Worksheet, choose up to six organizations they're active in that you want to target.

#### Step 1

**Conduct internet research** on the groups you've uncovered.

#### Step 2

**Use the criteria below** to determine which are viable markets, and become a resource for those in that market.

- Focus on groups where your best clients or prospects network.
- Choose groups where your best clients' interests and passions align.

#### Step 3

**Select one or two** to move forward with your search.



**Complete your market research by answering these questions.**

1. Do you have a bond or rapport with the group so you can position yourself as a resource, and more than just a salesperson?
2. Can you join the organization to show your commitment?
3. Does the group meet regularly, so you can build relationships?
4. Can you meet the members' needs with your services?
5. Is the membership greater than 250, including affiliated markets, in order to be sustainable?

## Getting involved goes a long way

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

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