

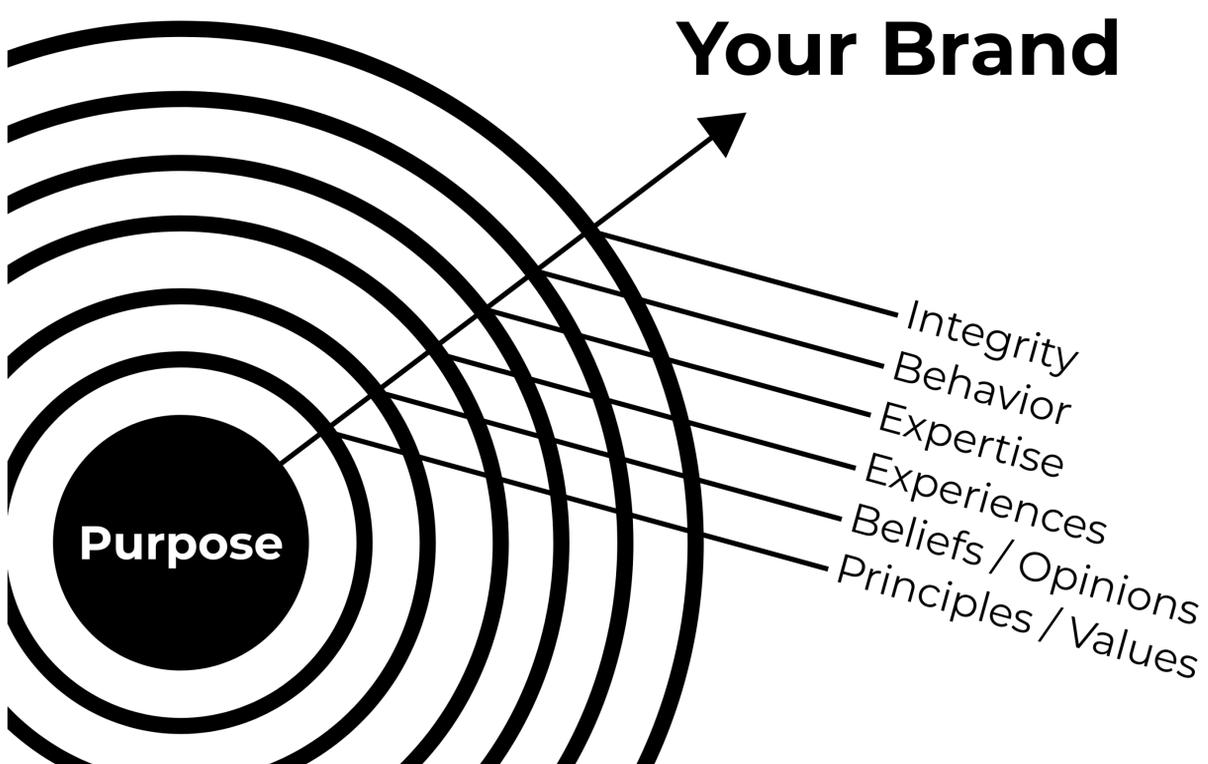
Design Your Advisor Brand



Simple Steps To Build A Brand That Works!



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#tangiblealpha

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“ *Your Advisor Brand is the catalyst for your perpetual relevance.* ”

Grant Berger



We wanted to make it as simple as possible for every advisor to be able to design their unique brand and this is the structure which makes it possible. This isn't for every advisor. It's only for the advisor who wants to take complete control over the perception of their value.

STEP ONE

Purpose

This is the first of six simple steps for any and all advisors to be able to design their brand so they can remain perpetually relevant.

PURPOSE

It all begins with your client-centered purpose. This is the cornerstone in the foundation of your perpetual relevance. Your brand is a tight combination of value trust integrity and accountability. The model has been designed to replicate the fundamental steps of trust building in the digital age of financial service.

This is the model that we will use to design your unique brand. All of your responses to the questions will be unique to you. Your answers will determine the definitions of your value and that value will become tangible to forge trusting partnerships in this digital smartphone-first world.

Your purpose is subject to modification. Always. As you design your unique advisor brand you will be able to move forward by looking back. The elements of your brand will enlighten your thought process... the definitions that define your value through these foundational modules will empower you to edit your purpose until you have found just the right words to describe your advisor alpha... this is your brand. Your advisor alpha, once tangible, will create the perfect blend of awareness and demand for your unique brand... your unique value. Your tangible advisor value is your advisor brand.

Your brand will enable you to maximize your relevance in a smartphone world when marketed in the right way. But before we can create your perpetual relevance through marketing, we must first design your brand... your Tangible Alpha. This is an interactive e-book designed to guide you through the modules of "The Advisor Brand" exclusively offered at TangibleAlpha.com.

Once you complete module ONE continue reading your free guide to your unique brand design.

STEP TWO

Principles

You must be principled. You must set your own standard of excellence. Others must qualify to become trusted partners and access your wisdom. You must promise your behavior to publish and maintain your unique standards of excellence.

Digital trust and collaborative partnerships hinge on your behavioral promises, in order to make those necessary promises you must establish and share your principles tangibly.

Given what I know today, are my defined principles and values guiding my business to where I want to be?

- Gaining complete control of the perception of your value requires authenticity.
- Your previous claim of having a client-centered purpose requires support, you need to be able to walk the talk.

So we have to create a tangible connection between your purpose and your expected behavior. Otherwise, you don't have a purpose, you have a catchphrase.

Your unique values and principles are two connectors between your purpose and the behavior that you will promise. Which means, your foundational principles and values must be defined in your own words. Just as all of the elements of your Tangible Alpha must be defined by you... not Webster.

You must document your principles and values to hold yourself accountable for the behavior that must be promised to earn trust in the era of the collaborative client.

Also, we need these definitions of your alpha documented now, for greater impact in the learning modules that follow.

Always remember that you must own these words to take complete control over how your authentic value is perceived.

Your Values and Principles must be defined and documented by you.

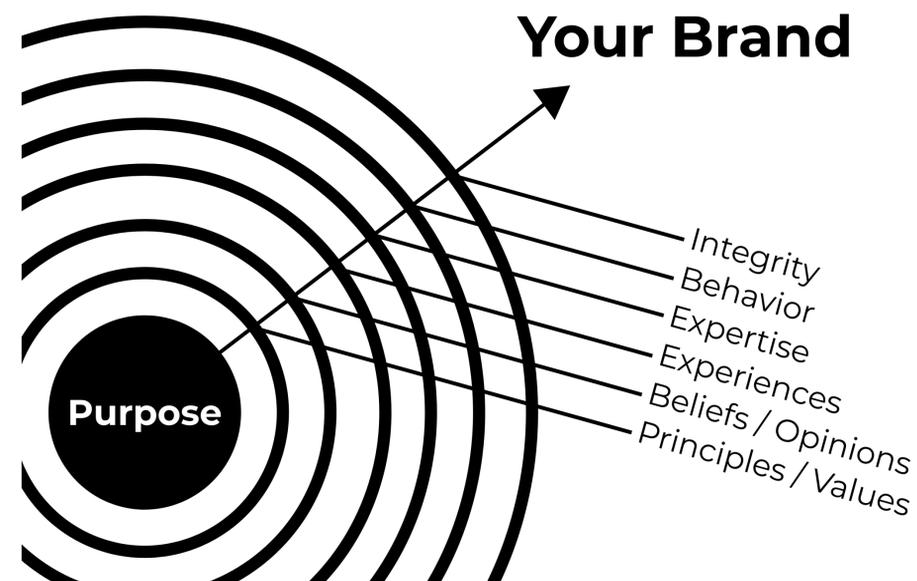
Connecting the dots between your shared purpose and your promised behavior requires some very specific exercises to design content for digital delivery. You also must be able to frame conversations that point to your unique value.

Your values and principles go beyond the industry standard "core company values" and delve into the framework of your own personal creed.

In the digital age of transparency you must create a tangible connection with your existing clients as well as ideal prospects. The design of digital trust is now drawn across multiple mediums and your principles and value help to guide your ideal audience through the digital noise and into your den of digital trust.

There is no need to get hung up on this learning session... pick a word, write your definition and move on. There will be time for wordsmithing later.

Document your foundational values and principles and advance to the next learning module.



STEP THREE

Beliefs

You cannot explain your value without unique definitions of your alpha.

The beliefs and opinions referred to in this foundational module refer to the perception you have about your business and the financial services industry.

We are looking at this facet of your value design from a perspective framed by your fundamental truths and your genuine concerns.

Your opinions and beliefs are incredibly important, they are so important, that you get paid for sharing them. These foundational exercises are the gateway to connecting your unique valued opinions and beliefs to your unique solutions.

Documentation of your foundational opinions and beliefs in the form of fundamental truths and genuine concerns is a stepping stone in your Tangible Alpha branding progression that will pay enormous dividends to you and your clients for the rest of your career. Check out the examples and follow the directives provided to document your foundational beliefs and opinions.

Establishing Authenticity and Relevance

Your beliefs and opinions must be published for digital consumption to establish your authentic relevant value for digitally empowered consumers. When we talk about making your Advisor Alpha Tangible, this is the essence of that concept.

You can not control the perception of your value without unique definitions of your alpha.

These definitions are derived from your unique opinions and beliefs about this industry and how your perspective is valued by your ideal audience.

You simply can not move forward in the digital age without publishing your beliefs and opinions. Making these concepts tangible creates efficiencies of scale by leading your audience to your solutions through exclusive qualification rather than inclusive sales jargon.

Write down your beliefs and opinions about the given topics and advance to the next learning module.

STEP FOUR

EXPERIENCES

- Your life experiences create tangible touchpoints with your ideal audience.

How did you get where you are today?

Ownership of the perception of your value requires validation of how you got here. This is a foundational exercise in the authentication of you. Your life experiences have helped to shape who you are... your career experiences have assisted you in becoming a trusted source of wisdom.

Exactly how have your life and career experiences impacted the way you deliver wise counsel? These words are not for the world to see or hear... not yet. But your experiences are not doing you any good as memories. Your claims of purpose principles values beliefs and opinions will all become authorized when you strategically publish your experiences.

Remember, authorship is ownership, you must own the words to control the perception of your value.

Make The Connection

What Makes You Unique, Makes You Elite.

By documenting your life's experiences you will be creating tangible connecting touch points that your ideal audience can identify with. The digital representation of your life is also designed to reduce the impostor syndrome effect... creating conversation points of mutual interests that naturally render peace of mind and trust.

You should never try to be anything that you are not, there is no faking when it comes to earning the trust required to become a steward of another person's wealth. If you haven't already, you will discover – what makes you unique is what makes you elite to your ideal audience. Earning trust through authenticity requires a tangible, digital, published form of your experiences.

Document some of the noteworthy life experiences you have had and move on to module five.

STEP FIVE

Expertise

How Do You Describe What You Do?

Making your wisdom tangible for digital consumption requires some thought.

You must be able to articulate in your own words; what you do, in a way that your ideal audience understands and appreciates. The words you use to describe your value must become tangible for digital consumption.

Your **tangible wisdom** must become efficiently and seamlessly distributed across multiple mediums for both clients and prospects to experience.

This isn't about crafting content for a call to action that gets the most clicks.

This micro-lesson has been designed to guide you through the necessary steps toward gaining greater control over how your wisdom is perceived.

Your knowledge, skills, and experiences help define your wisdom in the form of features and benefits. Your wisdom is a representation of the unique platform you provide to qualified clients.

Your platform of products and services must become tangible in the era of the digital consumer.

Your audience must be able to identify with, consume, and help you refine your platform of wisdom 24/7.

Your ideal audience must understand -You can't be all things to all people.

This module helps you build a filter for developing ideal relationships... by design.

- I have packaged my wisdom for omnichannel distribution.
- My clients can describe what I do to the people they care about the most.
- I have a system for refining the definitions of my authentic value.
- I feel it is critical to have the features and benefits of my business easily understood.
- If I don't define my value I will become commoditized.

To gain greater control over the perception of your value,
your wisdom must become tangible.

STEP SIX

Behavior

Your Behavior Must Be Promised in the Digital Age

The concept of giving 110% or over exceeding expectations 100% of the time is antiquated and doesn't read particularly well in the age of digital transparency. In other words, it makes you look phony, fake, or even worse... just like everyone else.

Setting and maintaining expectations, however, is a different concept that requires a different skill set... far from the status quo, company slogan touting, salesman of yesteryear.

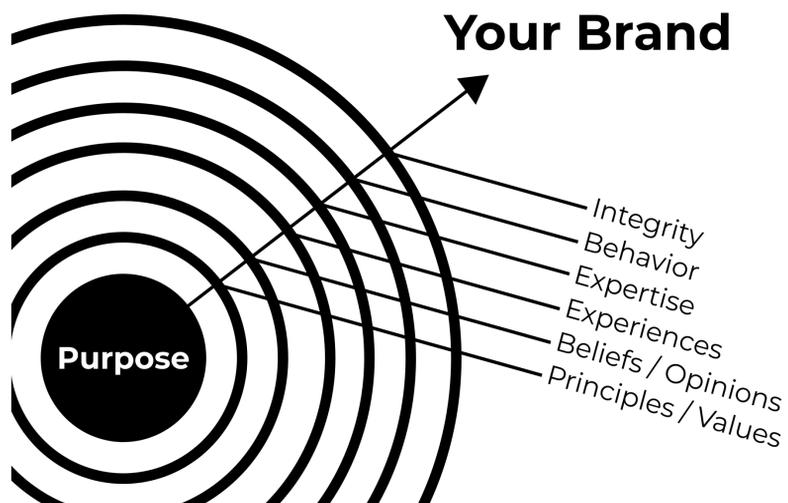
To get and keep ideal clients in the new era of collaborative financial services, you must be able to set and maintain expectations. This is no longer an option for the advisor, it is requisite for survival.

"I have designed a list of behaviors that my clients can expect from me. I think that setting expectations is the key to keeping clients happy. My clients understand what they should be expecting from me in the form of my promises. I know that it is impossible to under-promise and over-deliver in the age of digital transparency. I feel it is important to set the standard of behavior to create trusted partnerships. I must be able to gather feedback to refine my business."

You will never be able to completely control the perception of your value unless you master the art of setting and maintaining expectations. Your accountability and integrity are dependent on your behavior being in complete alignment with your purpose, principles, values, beliefs, and opinions. (Expertise and experience add touch-points to the model) To round out your strategic Tangible Alpha Branding foundation, you must put into your own words, the behavior you can promise to your prospects and clients. Establishing the expectations for your behavior gives you a license to set the standard of excellence for all collaborative interaction required to do business with you. You promise your behavior and your trusted partners must promise theirs in return. This is the new client contract in the age of collaborative consulting.

Summary

Your unique Tangible Alpha Brand consists of six foundational elements of relevance.



You need to be omnipresent... your advisor brand buys you real estate on the screens of your audiences and helps to ensure your relevance for years to come. This is how you make your clients "feel" your value 24/7.

Discovering, Defining, and Designing your Tangible Advisor brand empowers you to market your brand in a way that creates perpetual relevance.



Without a proper brand there is no ability to market your value properly. Building the foundation of your sustainable relevance requires introspection guided by the right questions. **This is the right formula for success by design in the digital era of financial services.**

If you can't define your value in your own words, how can you expect your audience to be willing to pay for your services? Simplify the way you share your relevance. Stay connected with your clients. Refine your authentic value to maximize your relevance. Your Tangible Alpha Brand is the catalyst for your perpetual growth in a smartphone world.

NEXT!

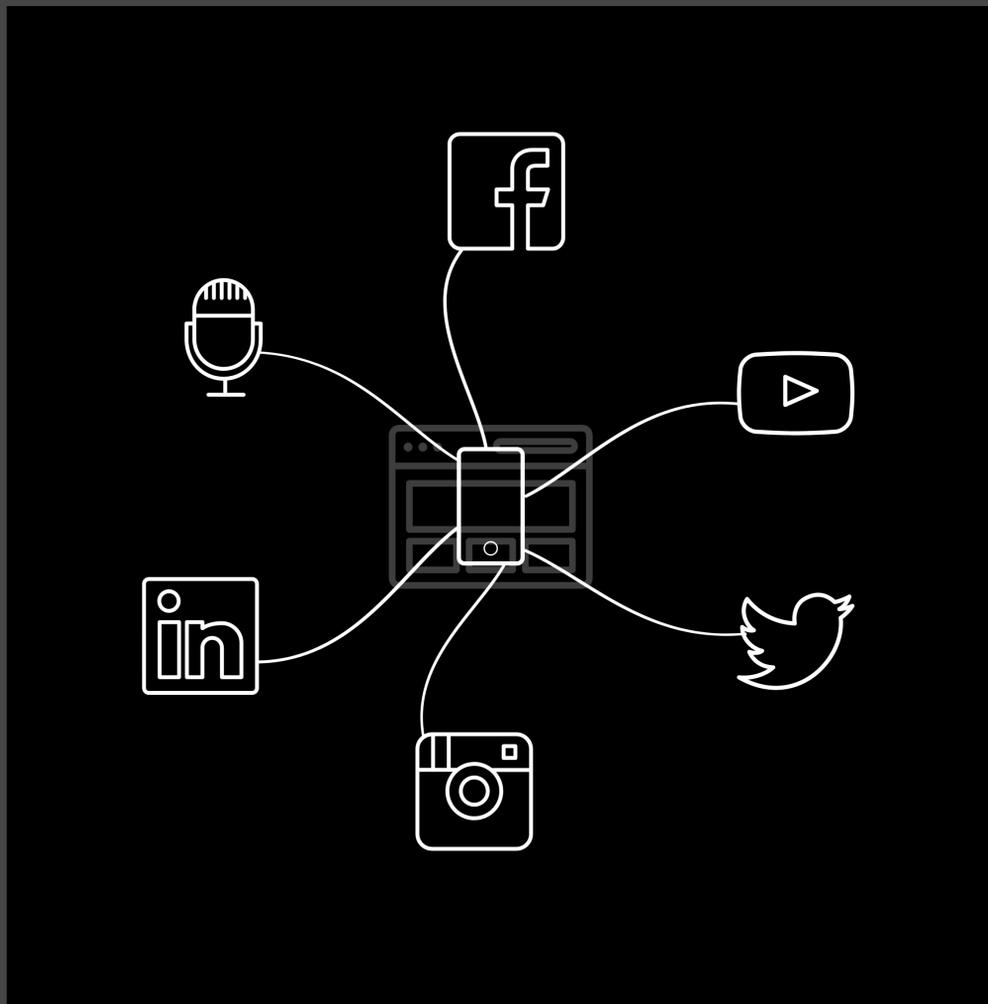


Deign Your Brand

Take It To Market

Stay Relevant

PurposePage.com



Tangible Alpha Is The Advisor Brand

