

# KNOW NO BOUNDS

## KNOW SERVICE WORKSHOP

### DRIVE REVENUES WITH 5-STAR SERVICE

As with all Know No Bounds and Paragon Resources initiatives, our Know Service Workshops are designed with three critical objectives in mind:

- Growing revenues
- Deepening client relationships
- Increasing the efficiency of advisors' practices

Our workshops walk participants through the 5-Step Know Service process.

**Step 1—Analyze:** Participants gain a greater understanding of their current book of business, identify their ideal client relationship definition and develop their segmentation criteria.

**Step 2—Allocate:** Participants define the communication, appreciation, and other service elements that will differentiate their practice and demonstrate to their clients just how committed they are to servicing their needs.

**Step 3—Assemble:** Participants identify the critical people, technology, and knowledge resources required to deliver their service model.

**Step 4—Activate:** Participants are provided with the tools to actually activate their service model and begin engaging in the activities to deliver their service ingredients to existing clientele, new clientele, and prospects. Here, the team is utilizing tools, checklists, and processes to systematize their delivery.

**Step 5—Assess:** To bring participants full circle with the Know Service Process, in step five, they are given tools and information to assess their new service model, make “tweaks” to help maximize what’s working and adapt the elements that perhaps are not.

### DELIVERY

Half Day Program

Full Day Program

1.5 Day Program, including Managing For Success DISC and Workplace Motivators Assessments Overview

### WHAT'S INCLUDED

To maximize results, our workshops are supplemented with a copy of the book and companion digital files including all tools. In addition, we work with our corporate clients to customize our programs, ensuring we reinforce both your message and your company's tools and resources. Lastly, an implementation program can be designed to include follow-up coaching sessions.

### WORKSHOP RESULTS

- An increase in both assets managed and revenues generated
- An increase in asset retention, client retention and loyalty
- An increase in referrals by building client advocacy
- A more efficient practice and team
- Personal satisfaction in doing right by the client

For a customized proposal, [email](mailto:Dale@KnowNoBounds.net) or phone us today.