



Perform with Precision



MASTERPOINT™

A COMPLETE BRAND STRATEGY PROGRAM FOR FINANCIAL ADVISORS

A program delivered exclusively by The Personal Coach

CONFIDENTIALITY

Welcome to MasterPoint™

A powerful and complete brand strategy program
delivered exclusively by The Personal Coach

The MasterPoint™ Program has become an effective brand solution due to extensive research, team collaboration and feedback from advisors.

To respect our time and effort in the development of MasterPoint™, we ask that this document and all of its contents not be shared with any other individuals or businesses.

Your understanding is very appreciated.

Thank you

*Fortunato Restagno & Juli Leith of The Personal Coach,
Founders of MasterPoint™*

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Perform with precision for your best audience.



A Complete
Brand Strategy Program
Designed Specifically
for Financial Advisors.

What You Will Experience

1. Effectively define your own unique brand.
2. Determine only the most effective TouchPoints (marketing tactics).
3. Connect with your best clients.
4. Create an audience that will love to tell others about a great experience.



THE PERSONAL COACH

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MASTERPOINT™

WHAT is MasterPoint™?

The MasterPoint Program is a fluid execution of brand strategies that connect you with an audience of outstanding clients. It helps you define your own unique brand and determines all the right TouchPoints in the audience experience from the introduction to the Encore. Your audience will love to tell others about a great experience. MasterPoint orchestrates your move to the next business level.



Let MasterPoint help you perform with precision and focus.

WHY was MasterPoint™ Created?

It's simple. There was a big need for an effective branding program for advisors. Our coaches have heard stories from advisors regarding their current marketing and branding obstacles and how their marketing efforts and investments have not met their expectations.

Here are just a few comments we have heard from advisors:

- ▲ My previous marketing firm did not fully understand my specific needs and my industry. I felt I had to educate them rather than they educate me.
- ▲ I have several marketing pieces. I have a brochure and a website. They don't fully capture who we are.
- ▲ When I look back at all our marketing pieces, I see inconsistency. We look like several different companies rather than one.
- ▲ I'm not getting the expected return on my marketing dollars. It's not an investment. It's costing me.
- ▲ We aren't getting the clients we do our best work with and don't know the best way to attract them.
- ▲ Marketing is not my specialty. I want to spend my time working with my clients and building relationships. That is what I'm good at.
- ▲ I feel like we are the best kept secret.
- ▲ I want a brand that will give me the energy and confidence to build my business.

HOW We Help?

At The Personal Coach our coaches have worked in your industry and understand your needs. The MasterPoint™ Program has been designed to look after you. Your MasterPoint team will consist of a coach and a brand specialist. They will help you create a powerful, customized brand strategy focused on performance and results.



IMPORTANCE OF PLANNING FIRST

Look at the triangle pointing down on the left. As an advisor, do you take a tactical approach first with your new clients to sell them products before you learn about their goals, lifestyle and financial situation? Absolutely not! The best approach is a strategic one. Just as you advise your clients to look at their whole plan rather than individual products, we recommend that your brand strategy start with a plan.

Many advisors we see have taken a **backwards perspective** ~ they start with a TouchPoint, or tactic, in mind because they've heard of a great idea or concept. They may have been approached by a marketing firm selling the benefits of having a brochure or a direct mail campaign. Advisors looking for a quick fix often act "in the moment". In many situations, the advisor is disappointed with the results. In addition to the cost, the message may be weak if the marketing firm does not understand the financial services industry and the advisor's unique contribution. As a result, the calls that the advisor does get from prospects may not be the right fit.

Another potential obstacle from "**acting in the moment**" are TouchPoints that lack consistency because they've had different people developing designs, each with their own ideas, messages, images, shapes and colours. The advisor's firm looks like several different companies and the result is a confused prospect.

Take a strategic approach to your marketing and branding. The Personal Coach knows your industry and by using the MasterPoint Program™ we can help you build a solid and focused brand strategy that will give you the success you are looking for.



THE PERSONAL COACH

**Before you begin MasterPoint™
learn what your front row
clients value**



Personal Client Interviews

Before you begin MasterPoint™ determine what your clients absolutely value about working with you. We will interview 6 of your best clients. Our coaches are trained to uncover key information and use well crafted questions to reveal the most powerful "emotional connections" between you and your best clients. Let's find out why they appreciate the work you do, why they look forward to meeting you and why they refer you to others.

The comments uncovered will not only boost your daily confidence but this key information is vital to help us build your brand foundation.

The investment fee is \$1200+GST for 6 interviews.

Additional interviews are available upon request at \$200+GST per interview.

Call your personal coach for information
Main line 519-575-2262
info@thepersonalcoach.ca



MasterPoint Process™

Before you begin the MasterPoint Process please complete
The Personal Coach Assessment™ and The Personal Client Interviews™

STAGE ① BRAND STRATEGY MEETING

Face to face discovery session & client interview feedback

STAGE ② BRAND STRATEGY RESULTS

Your brand strategy & personalized brand theme to set the main stage

STAGE ③ MASTERBRAND DOCUMENT

Development of your brand communication & your corporate identity

STAGE ④ MASTERPIECE DOCUMENT

Concept of your core brand “look” to set the stage for your TouchPoints
(Eg. A business card, cover of a presentation folder & website homepage)

STAGE ⑤ THE CONDUCTOR DOCUMENT

Recommended TouchPoints and budget investment list

STAGE ⑥ MASTERPOINT BRAND BINDER

A guide that will keep you & your team focused on your brand

MasterPoint Logo Organizer

You will also receive all your logo files for print, web and office use. Included are guidelines to show you where and when to use each logo.

READY TO PERFORM

You now have the tools to keep you and your team on brand and are ready to start designing your TouchPoints to confidently communicate the value of your services.

For additional services contact a Coach to keep you in action and measure your success in business and life.



A Master Performance

OUR CLIENTS

Humans are 80% emotional and 20% rational making human emotion the principal currency of today

To view additional client TouchPoint samples go to
www.thepersonalcoach.ca



CoralLife (Previously GreenCam)

BEFORE



Front cover

Back cover

Inside spread

MasterPoint Brand Tip

On average if a client has a great experience they'll tell 2 others. If they have a bad experience they will tell 20 others.



MASTERPOINT™

CoralLife^{INC.} TODAY



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CoralLife INC.

TODAY



MASTERPOINT™

Good Redden Klosler

BEFORE

Inconsistency



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MNK Financial Services Ltd.



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For more information on any of The Personal Coach services call a coach near you
or call our main line at 519-576-2262.



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