
# 2016 MDRT Annual Meeting e-Handout Material

**Title:** Build a Brand That Sets You Apart

**Speaker:** Doug Towill, MBA

**Presentation Date:** Tuesday, June 14, 2016

**Presentation Time:** 3:30 - 5:00 p.m.



Million Dollar Round Table
325 West Touhy Ave.
Park Ridge, IL 60068 USA

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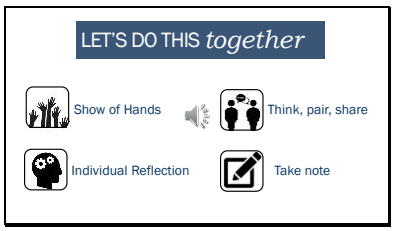


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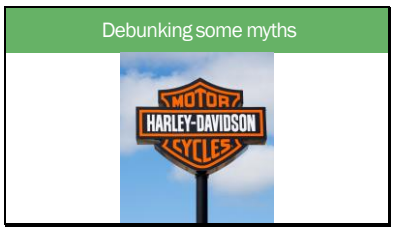


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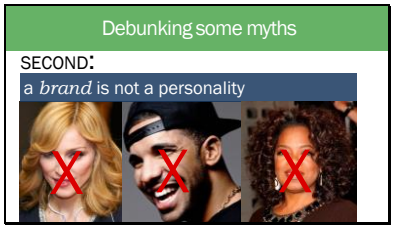


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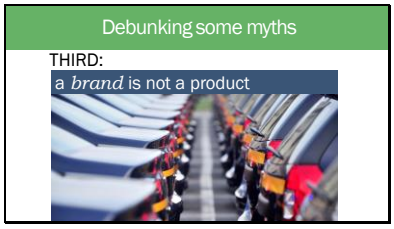

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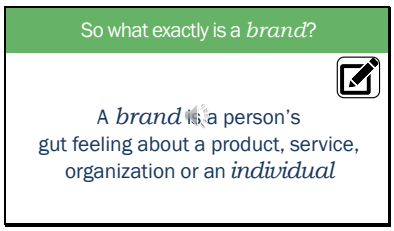


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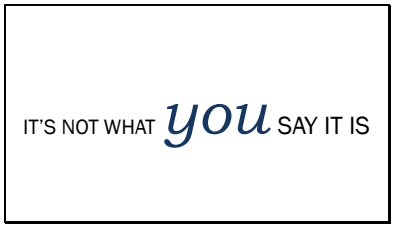

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IT'S WHAT *they* SAY IT IS

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Personal *branding* defined

using a deep understanding of your unique gifts and distinct purpose to influence how you are perceived by others

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WHY IS HAVING A

*brand*

SO IMPORTANT?

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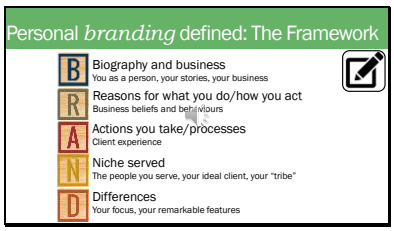


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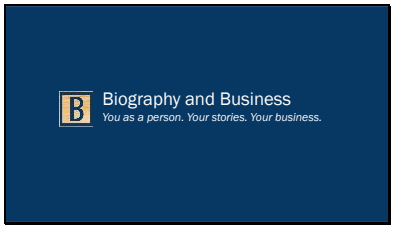


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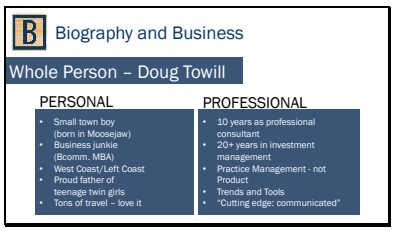


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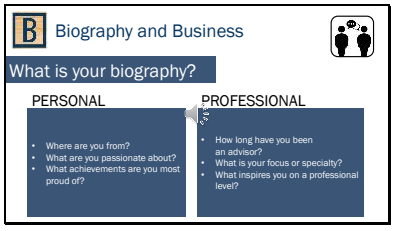


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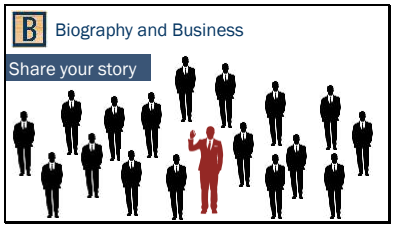

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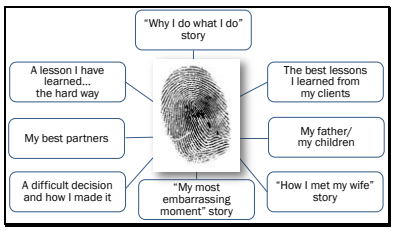


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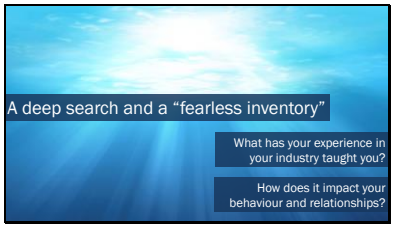

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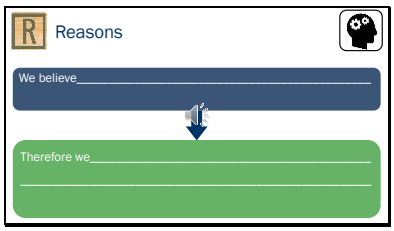


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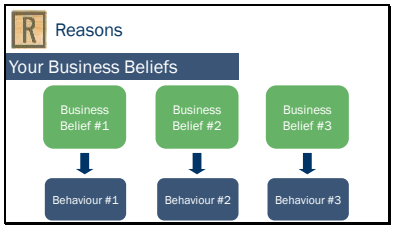


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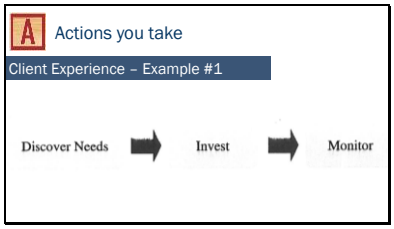


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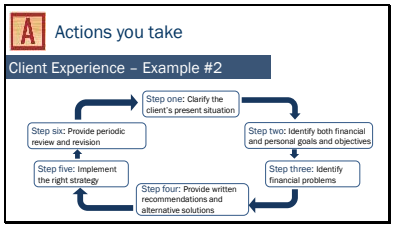

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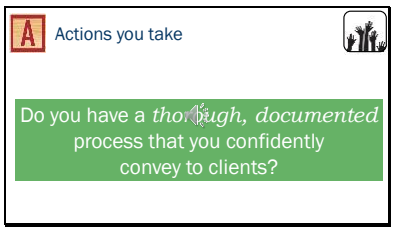


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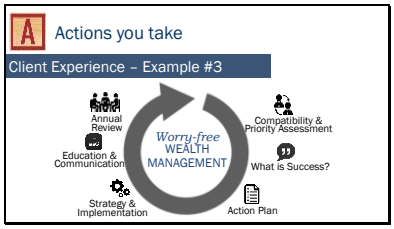


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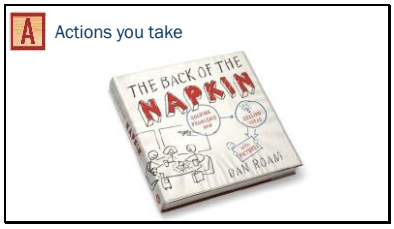

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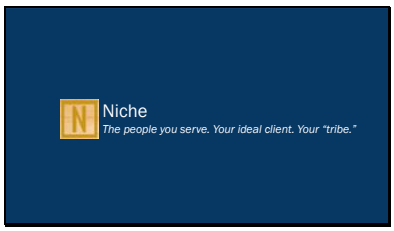


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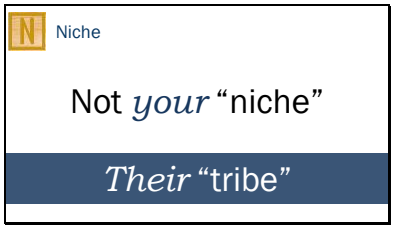


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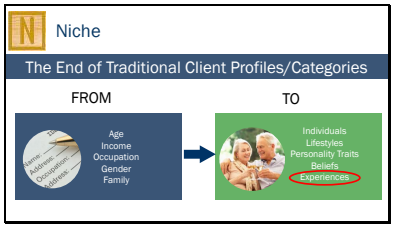

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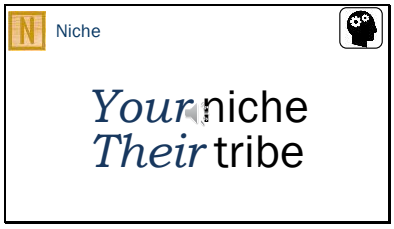

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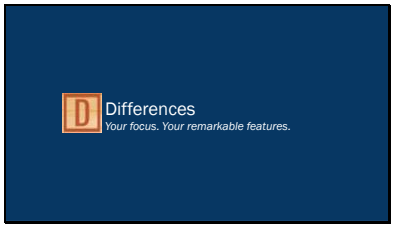

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The three most important words in differentiating your personal brand:

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Focus

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Focus

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# Focus

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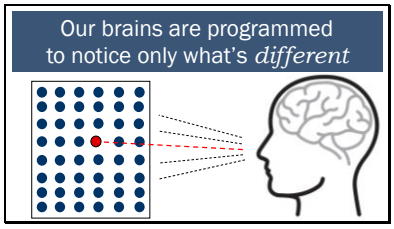

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SOLUTION:
BE *different*

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NO.
REALLY *different*

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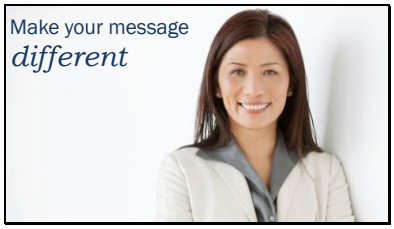


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# 80/20 Rule

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80

Differentiate yourself by:
*The questions you ask*
*The way you listen*
*The relationships you build*

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20

Help the clients and prospects
by being very ready to articulate:
*Your value*
*Your brand*

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Slide 76

## Thank You

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Presented by Doug Towill, MBA

# BUILDING A *b*[illegible]TS YOU APART

MDRT
ANNUAL MEETING
2016
JUNE 12–15
VANCOUVER

# ABOUT *Doug*

Doug Towill, MBA, is Senior Vice-President of Strategic Business Development at CI Investments – the leading independent asset manager in Canada. He has dedicated his 30-year career to his passion: consulting to business professionals.

Since 1997, Doug has led groups that provide cutting-edge solutions to individual financial advisors, advisor teams and financial services organizations worldwide.

Doug has addressed countless audiences on issues clients face and how advisors, as trusted professionals, can best help them.

His dynamic and high-energy presentations provide both the impetus for change and the practical tools and techniques necessary to make substantive and sustained change a reality.

# ABOUT THIS *Focus Session*

Does your brand allow you to enjoy the success you deserve? In a market that bombards consumers with overwhelming amounts of information, financial advisors need to have a clear and powerful brand in order to stand out. In this session, Doug will introduce and explore a proven brand framework to help you:

- Develop your core messages to position yourself competitively
- Identify the foundational business beliefs that drive your actions and processes
- Effectively articulate your brand to clients and prospects.

You will be recognized as a leader in the industry and the "go-to" individual by consciously building and communicating your brand.

# ABOUT THIS *Workbook*

This content and exercises shown in this workbook are based on segments from the *Personal Branding for Financial Advisors* **full** workbook, which you will be able to access as a supplemental e-handout from the MDRT website at a later date.

# INTRODUCING THE *Brand* FRAMEWORK

The Brand Framework shown below is a comprehensive model that addresses the five major components of brand. To develop a powerful brand, you need to craft compelling and precise messages for each component of the framework.


## BIOGRAPHY AND BUSINESS

You as a person, your story, your business


## REASONS FOR WHAT YOU DO/HOW YOU ACT

Business beliefs and behaviours


## ACTIONS YOU TAKE/PROCESSES

Client Experience


## NICHE

The people you serve, your ideal client, your "tribe"


## DIFFERENCES

Your focus, your remarkable features

# THE *Comfort* CONTINUUM

Before attending Doug's Focus Session, please complete the table below. After the session, you will reassess your confidence and comfort levels.

The following topics could come up in a conversation with a client. How well prepared are you to respond to them? The comfort continuum measures how comfortable you are discussing these topics. Place a check mark under the statement below that most accurately expresses your feelings.

Uncomfortable ⟷ Very Comfortable

| TOPIC | I would be caught off guard and find it challenging to discuss. | I would be able to come up with something on the spot. | I have given this some thought and prepared comments, but don't feel confident with my response. | I am prepared for this topic and feel confident that I could discuss it at length, without hesitation. |
|---|---|---|---|---|
| Your personal and professional biography, plus the nature of your business. | | | | |
| How your experience impacts your business and relationships. | | | | |
| The deep need you satisfy for your clients. | | | | |
| How your business beliefs drive your behaviour. | | | | |
| How your process, the actions you take, creates a consistent, reliable and remarkable client experience. | | | | |
| The type of people you can best serve and the type of person you have had success with in the past. | | | | |
| How you are remarkable or different from other advisors. | | | | |

# BIOGRAPHY AND BUSINESS

You as a person, your story, your business

## Connecting Concepts to Practice: Personal Background

Your personal background is an important part of your brand. This exercise will help you to capture the key facts and determine what impact those facts have on your brand.

| Answer the following questions by completing the second column below. | |
|---|---|
| QUESTION | YOUR PERSONAL FACTS |
| Where are you from? | |
| Where did you grow up? | |
| Where did you go to school and what did you study? | |
| What are you passionate about? | |
| What achievements are you most proud of? | |
| What is your family like? | |
| What are your hobbies? | |
| What first attracted you to this business? | |

BIOGRAPHY AND BUSINESS

You as a person, your story, your business

## Connecting Concepts to Practice: Professional Background

Your professional background is an important part of your brand. This exercise will help you to capture the key facts and determine what impact those facts have on your brand.

| Answer the following questions by completing the second column below. | |
|---|---|
| QUESTION | YOUR PROFESSIONAL FACTS |
| What is your business biography? | |
| How long have you been in business? | |
| What is your focus or specialty? | |
| What is your inspiration? | |
| What is exciting about what you do? | |
| What do you love to do? | |

# REASONS FOR WHAT YOU DO/HOW YOU ACT

Business beliefs and behaviours

## Connecting Concepts to Practice: Business Beliefs

| In the "I believe" space below, fill in 4 of your business beliefs. Make sure your beliefs are specific to this industry. An example of a business belief specific to our industry might be *"I believe clients are best served by a fee-for-service compensation model in which the interests of the client and the advisor are aligned."* Then, in the "therefore I…" space below, explain the impact each of these beliefs has on your actions. | |
|---|---|
| 1. | I believe… |
| | therefore I… |
| 2. | I believe… |
| | therefore I… |
| 3. | I believe… |
| | therefore I… |
| 4. | I believe… |
| | therefore I… |

# ACTIONS YOU TAKE/PROCESSES

## Client Experience

| Do you have a thorough, documented process that you confidently convey to clients? |
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# NICHE

The people you serve, your ideal client, your “tribe”

| NOTES: |
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# DIFFERENCES

Your focus, your remarkable features

| What's one thing that makes you different? |
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# THE *Comfort* CONTINUUM: REVISITED

Now that you have completed this brand mini-workbook and attended Doug's focus session, it's time to re-assess your confidence and comfort levels.

The following topics could come up in a conversation with a client. How well prepared are you to respond to them? The comfort continuum measures how comfortable you are discussing these topics. Place a check mark under the statement below that most accurately expresses your feelings.

Uncomfortable ⟷ Very Comfortable

| TOPIC | I would be caught off guard and find it challenging to discuss. | I would be able to come up with something on the spot. | I have given this some thought and prepared comments, but don't feel confident with my response. | I am prepared for this topic and feel confident that I could discuss it at length, without hesitation. |
|---|---|---|---|---|
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| How your experience impacts your business and relationships. | | | | |
| The deep need you satisfy for your clients. | | | | |
| How your business beliefs drive your behaviour. | | | | |
| How your process, the actions you take, creates a consistent, reliable and remarkable client experience. | | | | |
| The type of people you can best serve and the type of person you have had success with in the past. | | | | |
| How you are remarkable or different from other advisors. | | | | |

# THANK YOU

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