**The *Build on Success* series of webinars is aimed at helping you to make the right decisions and take the right steps to develop, improve and rationalize the services you offer as appropriate and to ensure that they are both compelling to your clients and profitable for you**.

***Developing Viable Client Propositions***

covers topics such as

* Client Insight & Segmentation
* Service options & Charges/fees
* Communication of services

Not all of your clients may value equally, and pay for, the same kind of service offering. Are you able to meet, cost-effectively, the service expectations of different clients? Do you know how those service expectations vary across your client bank? Do you have a strategy for handling 'non-profitable' clients? Are you confident that you can communicate your propositions to clients effectively?

***A successful post-RDR Business Structure***

provides insights, advice and 'food for thought' on issues affecting your decisions on how you operate your business post-RDR, including

* The independent v restricted debate
* How and where do protection and mortgages best fit in?
* Benefits of and opportunities for outsourcing


Are you confident you understand the full implications of staying 'independent'? Would a combination of independent, restricted and simplified advice models work best for you and your clients? Have you considered all the outsourcing opportunities to reduce cost and risk to your business?

***Client Acquisition and Retention***

provides valuable ideas and advice on improving cost effective development of new clients as well as retaining those that are most valuable to your business, including

* Referrals: are you getting enough?
* Developing and maximizing professional introducers
* Effective marketing strategies

For many advisory firms, one likely consequence of the RDR is downward pressure on income as a result of the advent of more explicit advice charges, potentially requiring significant changes in activity levels to off-set the reduction. One major element in achieving this is to increase the number of clients being advised, which in turn means ensuring you have appropriate marketing strategies in place.

***Maximizing protection opportunities***

provides useful ideas on developing your protection business and communicating the importance of advice to clients, to include:

* Business Protection - are you exploiting the opportunities?
* Implications of the Gender Directive
* Importance, value and use of Trusts

Are you making the most of the opportunities that writing protection business provides? Would a commission-based income stream help support your business through the RDR transition? Are you confident of providing advice in this market?

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******The above list of topics is not exhaustive, and we are happy to tailor seminars/webinars to suit your business and its requirements. For more information and to arrange a no obligation meeting, call us on 01462 813020 or email us at enquiries@actionconsulting.co.uk



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