

HOW FEMALE FRIENDLY IS YOUR PRACTICE?

How you interact with women in general

1. When you meet with a (any) woman do you focus only what she says (answer yes) or do you multi-task (answer phone/check email/let someone interrupt/excuse yourself) (answer No)?
 Yes No
2. Have you ever attended the funeral of a client? Yes No
3. Have you ever visited your client at their home because it was more convenient for them?
 Yes No
4. Have you ever referred someone to a female client without expecting anything in return?
 Yes No
5. Have you ever had to call a female client to ask her if anything was wrong with her husband (e.g. dementia)? Yes No
6. Have you ever invited a female client who is an executive or professional to speak at a function you were involved with? Yes No
7. Have you ever helped a client get a lawn service provider or mechanic or doctor (non-financial referral)? Yes No
8. Have you ever done a personal favor for a client that is non-financial related (e.g. written a note of encouragement to a son/daughter of a client when you heard they had lost their job?) Yes No

How women interact with you

9. Do you get a holiday/birthday card from any of your female clients? Yes No
10. Have any of your female clients given you a referral to a new client in the last 12 months?
 Yes No
11. Has a client ever attended the funeral for someone close to you to show their support? Yes No
12. Do your clients call you to let you know they are selling their home? Yes No
13. Do your female clients know more about you than you know about them? Yes No
14. Has a female client ever told you something that counters what her husband told you? Yes No

How you manage your practice

15. Do you have a pleasant entrance to your practice where clients can be comfortable? Yes No
16. Do your clients ask more questions of your sales assistant than you? Yes No
17. When meeting with a female client have you ever taken notes rather than look at her? Yes No
18. Have you ever held an event that wasn't about investing? Yes No
19. Have you held a client event where more women than men attended? Yes No
20. Did the female clients bring a friend to your event? Yes No
21. Do your single female clients pay slightly more than your male or couples clients because they don't ask for a lower price? Yes No

22. Do you know the exact number of female clients you have (even those in couples)? Yes No
23. Do you know how much in assets your female clients represent? Yes No
24. Do you know the status of your female clients: single by choice, widowed, divorced Yes No
25. Do you serve women in pretty much the same way you serve male clients? Yes No

How you engage women in financial matters

26. Have you ever said, “don’t worry about that” to a female client? Yes No
27. Have you ever advised a client how to make up income lost through maternity leave? Yes No
28. Is the retirement plan you created for a couple based on the woman’s needs not her husband’s? Yes No
29. Has a female client told you she doesn’t understand investing very well? Yes No
30. Did you offer to help her understand by spending time directly with her? Yes No
31. Have you ever used a term that a female client had to ask you to explain? Yes No
32. Have you discussed spending as part of your role as a financial advisor? Yes No

Check your Score

Count how many yes’s you have to see how female friendly your practice is. The more yes’s the better you are doing, but remember, regardless of your score, there is always room for improvement. Women make excellent clients and learning how to connect with them is certainly worth the effort.

24-32 Congratulations! You are a superstar!

15-23 Not bad! You are doing a pretty good job but there is some room for improvement.

10-14 Uh! Oh! You got a few things going for you but certainly could use some help.

0-9 Yikes! You need lots of help if you want to run a female friendly practice.

StrategyMarketing.ca offers the following courses (see www.strategymarketing.ca):

- Retaining Female Clients (includes a proprietary risk calculator)
- The Art of Acquiring Female Clients
- How Women Make Financial Decisions
- How to Evaluate the Risk of Female Clients Leaving You
- Four Steps to Succeeding with Female Clients

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