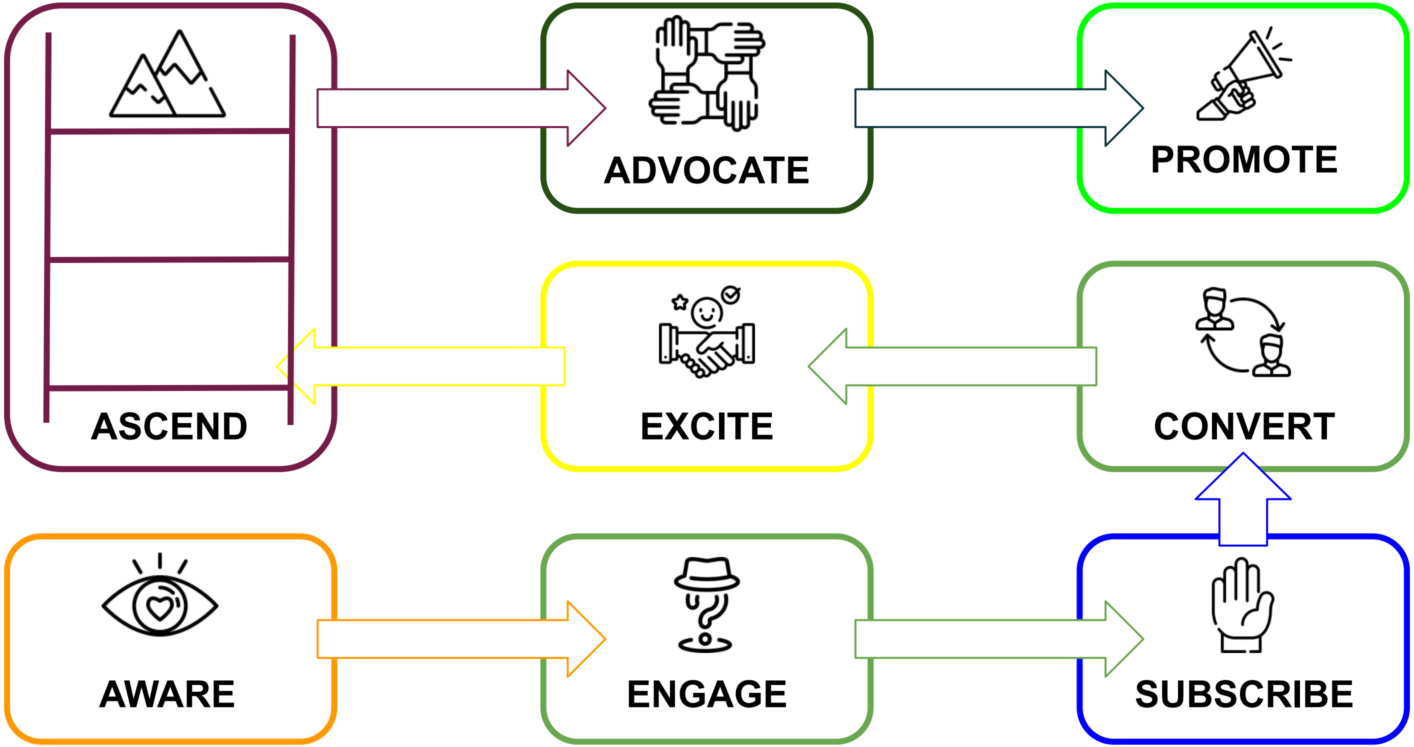
THE PARADIGM LIFE CLIENT JOURNEY

The process of turning strangers into raving fans



The Client Value Journey Definition

Businesses exist for one purpose only:

- ➔ To supply something of massive value to clients.

What is the only thing a business gets paid for?

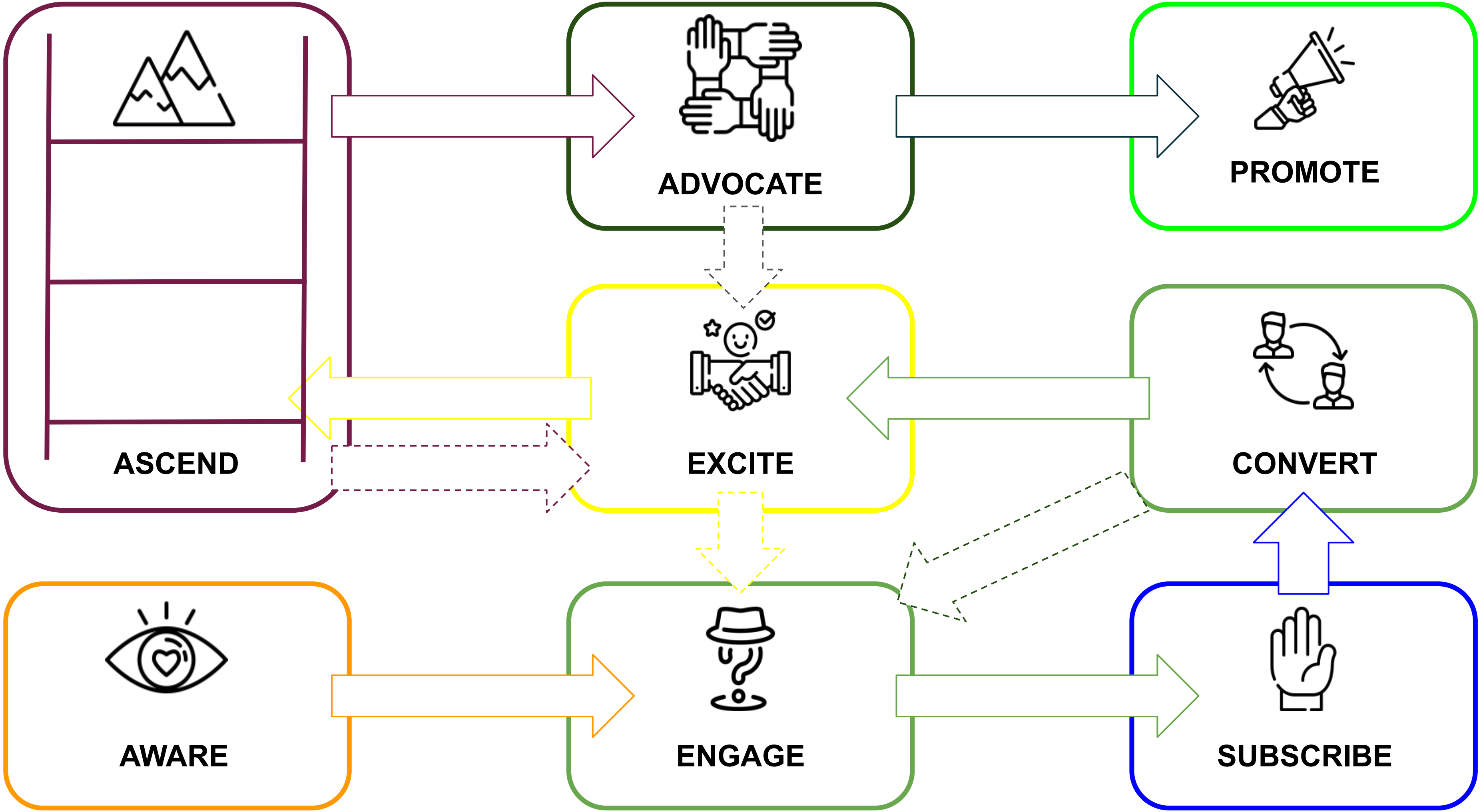
- ➔ Results
  - ◆ Results are the outcome of meeting a client's needs and desires.

What is a business?

- ➔ A System
  - ◆ A business is a system for consistently supplying significant value to clients.

What is the Client Value Journey?

- ➔ The Client Value Journey (CVJ) is a step-by-step process that describes how a Stranger becomes a Client for life.
- ➔ The CVJ is strategically organized into eight progressive stages. This stage-to-stage progression models the psychological process of how deep human relationships are formed, specifically, how people start out as strangers and eventually become partners for life.
- ➔ The CVJ describes a Prospect’s progression through each of the eight stages with the end result being a raving fan Client for life.
- ➔ The journey begins with a stranger discovering the Paradigm brand. Then, the progressive establishment of trust, credibility, and expertise by learning from content and having meaningful conversations.
- ➔ The CVJ is strategically organized so prospective and current Clients don’t get lost, confused, and distracted along the way.
- ➔ The CVJ is a closed-loop system and never ends - it becomes a path for current clients to experience even more value throughout their life.


ADVOCATE
PROMOTE
ASCEND
EXCITE
CONVERT
AWARE
ENGAGE
SUBSCRIBE

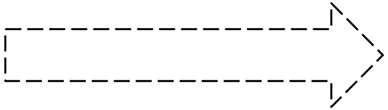
Stage number: Stage Name

Ownership: Current Department

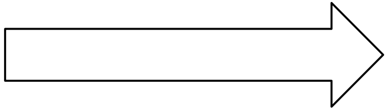
Stage Description: Describes the stage in simple terms.

Step 1: In stage

Rescue/Attrition Strategy:



Step 2: Transition to next stage



Stage 1: Aware

Ownership: Marketing

Stage Description: The prospective Client (Prospect) becomes aware of Paradigm Life.

VALUE CHAIN

Aware Steps

<u>Step 1</u>: The Prospect becomes aware.

1. Views an written, audio, or video advertisement.
2. Receives a recommendation or endorsement by a third party.
3. Receives a recommendation or endorsement by a family member, trusted mentor, colleague, friend, or acquaintance.
4. Views a mention, tag, or reference on social media.
5. Listens to a podcast or radio interview.
6. Experiences a presentation at a live or online event.

<u>Step 2</u>: The Prospect takes action.

1. Clicks on a search engine listing.
2. Clicks on the advertisement ‘call to action’ (CTA).
3. Visits the referenced website.
4. Visits a social media page.
5. Makes a phone call.
6. Sends an email or online message.

Stage 2: Engage

Ownership: Marketing

Stage Description: The Prospect learns about Paradigm Life through various forms of online content.

The **engaging** content is relevant to them and speaks to their needs and desires accurately and compellingly.

The Prospect begins trusting the brand as they absorb the content, and realizes that what they are learning will improve their financial life.

Prospective clients and current clients **engage** with content throughout the Value Journey.

VALUE CHAIN

Engage Steps

<u>Step 1</u>: The Prospect engages with content.

1. Reads an email.
2. Reads a blog post.
3. Reads a white paper or article.
4. Listens to a Wealth Standard or Perpetual Wealth Strategy podcast episode.
5. Attends a live or pre-recorded webinar.
6. Views a video tutorial.
7. Analyzes a relevant case study of someone like them.

<u>Step 2</u>: The Prospect pursues additional information.

1. Submits contact information in exchange for more valuable content.
2. Initiates a conversation through the website messenger.
3. Accepts and responds to a text message.
4. Accepts a phone call.
5. Has a meaningful one-on-one conversation with us.

Stage 3: Subscribe

Ownership: Marketing

Stage Description: At this point in the journey, the Prospect knows Paradigm Life and has engaged with valuable content. However, they have not identified themselves.

After the Prospect engages, they identify themselves by making an exchange.

In exchange for their contact information and permission to communicate with them in the future, they **subscribe** to even more relevant and valuable information.

VALUE CHAIN

Subscribe Steps

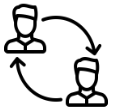
Step 1: The Prospect identifies themself.

1. They exchange contact information for even more valuable content.
2. They experience relevant and intrinsic value in the content.

Step 2: The Prospect connects the content to their situation.

1. The content quality builds even more trust.
2. The content demonstrates expertise.
3. The content is solution-oriented.
4. They start believing that Paradigm Life can help them.
5. They are compelled to discuss their specific financial situation.
6. They are curious to see how a personalized wealth strategy can improve their life.

Stage 4: Convert



Ownership: Sales Development

Stage Description: The moment when the Prospect invests time or a small amount of money because there is an asymmetric value proposition - tremendous value with little skin in the game.

The Prospect makes a significant commitment to talk with somebody about their finances.

The **convert** stage is the pivot point that signals trust and credibility in the brand and how it’s products and services can help them.

VALUE CHAIN

Convert Steps

Step 1: The Prospect has a meaningful conversation.

1. Trust, empathy, and confidence continue to build.
2. Objectives, challenges, and needs are discussed and validated.
3. They commit to taking the next step.

Step 2: The Prospect values spending even more time and energy.

1. They enjoy the meaningful conversation which promotes a consultation with an empathetic and experienced Wealth Strategist.
2. The consultation coordination is easy and convenient.
3. They receive follow up guidance and verification that speaks accurately to the purpose and value of the next meeting.

Stage 5: Excite

Ownership: Sales

Stage Description: The Prospect becomes **excited** by connecting an even better financial life to the implementation of our products and services.

They experience an organized, thoughtful, and relevant process that consists of meaningful conversation,practical tools, and expert guidance.

The presentation of solutions and recommendations are simple, clear, and personalized.

The Prospect understands how and why a relationship with Paradigm Life will benefit them and are **excited** to move forward.

The **Excite** stage of the Value Journey is not a singular event. Current Clients will consistently come back to the **excite** stage as a result of new content that meets their needs and align with their values.

VALUE CHAIN

Excite Steps

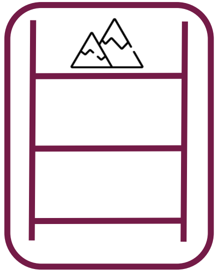
<u>Step 1</u>: The Prospect has meaningful conversations with a Wealth Strategist.

1. The Wealth Strategist builds off of the momentum created by relevant content and meaningful conversations.
2. Additional meaningful conversations build even more trust and credibility.
3. Questions to them are engaging, thoughtful, and effectively validate their needs, objectives, goals, desires, and dreams.
4. The Prospect willingly completes a full Financial Questionnaire in an expression of trust.

<u>Step 2</u>: The Prospect is presented with a personalized wealth strategy that accurately speaks their situation and clearly describes how our products and services benefit them.

1. The wealth strategy clearly describes how the recommendations meet their needs and align with their long-term values.
2. The wealth strategy charts a path into the future including specific solutions-based recommendations.
3. They understand the approval and implementation process and are committed to taking those next steps.
4. They are **excited** to move forward.

Stage 6: Ascend



Ownership: Sales

Stage Description: The Prospect implements the recommended products and services and becomes a Client.

In the **Ascend** stage of the journey, trust, credibility, expert guidance, and relevant recommendations all converge to compel the Prospect to move forward.

The **Ascend** stage is a ladder by design. The ladder represents both the initial value of the Paradigm Life products and services as well as new forms of value that align with their evolving needs, objectives, goals, and desires - getting them closer to their dreams.

Current clients return and implement additional products and services.

[VALUE CHAIN]

Ascend Steps

<u>Step 1</u>: The ease of the approval and implementation processes enhances the momentum created in **excite.**

1. They receive communication that is frequent and consistent.
2. They positively anticipate the approval and implement the recommendation.
3. The new Client experiences a meaningful onboarding process.

<u>Step 2</u>: The new Client is confident and committed to a successful future with Paradigm Life.

1. They know the members of their supporting team and how to connect with them.
2. They have an accurate reference to the details of their wealth strategy and the purpose of what they implemented.
3. They understand the purpose and nature of future discussions with their Wealth Strategist.
4. They understand that Paradigm Life offers other products and services that may align with their future objectives and needs.

Stage 7: Advocate

Ownership: Sales & Marketing

Stage Description: This stage of the value journey is when the typical Client becomes a **Raving Fan.**

The **Advocate** is a passive promoter and responds favorably to a request for a testimonial or referral.

When requests are made, the client **advocates** by providing testimonials about their experience and/or referring their family, friends, and professional network.

[VALUE CHAIN]

Advocate Steps

<u>Step 1</u>: The Client demonstrates they are a raving Fan by providing a digital testimonial.

1. The Client receives communication requesting a testimonial that will appear on Google and/or Facebook.
2. They are clear about the value of a testimonial.
3. They respond promptly and willingly.
4. The process is simple to complete.

<u>Step 2</u>: The Client demonstrates they are a raving Fan by providing a referral.

1. The Client receives communication requesting a referral.
2. They respond promptly and willingly
3. The request is clear, natural, and there is no resistance to the request.
4. The process is simple.

Stage 8: Promote

Ownership: Sales & Marketing

Description: Clients who **promote** are different from advocates.

When an audience of Prospects become aware of Paradigm Life from a **Promoter,** there is built in trust and credibility.

These valuable clients *actively* seek to share their experience with the brand, details of the wealth strategies, products, or services. They *actively* share it with their family, friends, and professional relationships.

In specific situations, they may **promote** because there is an incentive.

VALUE CHAIN

Promote Steps

<u>Step 1</u>: The Client has an outstanding experience and is motivated to share it.

1. They share relevant online content with their circle of influence.
2. They reference Paradigm Life and/or their Wealth Strategist in online activity.
3. They provide information and content directly to an individual.
4. They create their own material and share it with others.