

AAA Clients

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Most advisers have heard about segmenting clients into –

A B C

or even

A AA AAA

But this is not how to get AAA clients.

They must be able to pass these three tests.

A - Does the prospective client understand they have a problem, moreover can they enunciate their problem to me? If they can tell me about their problem they own it.

A - Do they want to solve the problem? Do they have enough motivation to make a start.

A - Do they have access to a chequebook, and can they write a cheque big enough to pay the cost of solving the problem?

If they cannot answer these questions positively they are not a prospect for me. Time to move on.