



**Top 10 List - Winning The Solutions-Oriented Finals
IMI Consultants Congress – April 5, 2012**

Andrew Klausner, Founder and Principal

Number 10: Do your research upfront and tailor your presentation to the unique characteristics and concerns of the prospect. Actively seek the counsel of the consultant to ensure that you are making them look good.

Number 9: Focus on your firm's strengths and don't compare yourself to the competition. That's not your job, and will make you look bad.

Number 8: Highlight your **Value Proposition/Mission Statement**. Answer the question: All things being equal, why should your firm be hired?

Number 7: Bring the right people to the presentation. Consistency in the client experience is important. Will they see this person/these people again?

Number 6: Describe your overall business philosophy and how it has adapted – talk about profitability, resource prioritization, distribution, etc. How are you retaining key talent?

Number 5: Highlight your operational capabilities and any changes that you have made over the past 12 months (personnel, procedures, etc.).

Number 4: Describe any process adjustments that you made in reaction to the 2008 financial crisis and the ongoing crisis in Europe. Were these changes permanent or temporary?

Number 3: Explain any unusual fluctuation in AUM. Differentiate between market losses and client terminations, withdrawals and redemptions.

Number 2: Explain how you're adapting to the uncertain and changing regulatory environment. Focus on transparency.

Number 1: Be humble – but confidently ask for the business!