ON3 STRATEGIES
CLARITY. SYSTEMS. GROWTH.

CLIENT SERVICE & EXPERIENCE

EVERY CLIENT GETS EXACTLY THE SERVICE THEY WERE PROMISED.
NOTHING LEFT TO MEMORY.

THE PROBLEM

Without a defined model, things fall through the cracks: expectations quietly go unmet, assets held away at other institutions never get uncovered, and referrals never get asked. Advisors spend too much time with the wrong clients and never see what that growth would have looked like.

THREE TIERS, THREE STRATEGIES

TOP
Retain, deepen, refer. Quarterly reviews, direct access, exclusive events, estate/tax/legacy planning.

GROW
Targeted to move up. Two to three reviews per year, consolidation-focused planning, shared events.

BASE
Efficient, consistent service. One review per year, standardized or virtual, open events.

THE ON3 APPROACH

Grading is AUM plus judgment: a strong referral source or a client's family member can rank higher than AUM alone suggests. Every call is logged in CRM and explainable to anyone on the team.

Every review follows the same agenda regardless of client, so the experience never depends on who's in the room.

1

2 A center-of-influence network (estate attorneys, CPAs) gets a quarterly touch cadence, tracked like any other recurring task.

3

4 Personal details, birthdays, hobbies, family, get captured in CRM so any team member can deliver the experience the advisor would.

> **If it's not in CRM, it does not exist.**
> – Erik Sauer, Founder of On3 Strategies

WHY IT MATTERS MOST

About 60% of an advisor's new growth in a given year comes from the existing client base: referrals, a fuller share of assets, deeper trust. Serve clients well enough to exceed what you promised, and that growth follows. Fall short, and it quietly walks out the door. Good for the client. Good for the advisor.

> **Never skip the referral ask.**
> – Erik Sauer, Founder of On3 Strategies

READY TO STRENGTHEN YOUR CLIENT SERVICE?

Let's start the conversation.

Discover what a strategic partner can do for your business.

REQUEST A SAMPLE SERVICE MODEL

WHAT WE HELP WITH

- Client grading & segmentation
- Client events
- Tiered service design
- Embedded referral system
- Consistent communication cadence
- CRM-driven operating system

> On3 helped me see the answer wasn't more clients, it was the right ones. With a service model built around client tiers, I can give those clients true white glove service. I finally own a business instead of just working one.
> – Tracy Randle, Oceanfront Financial Partners