THE EXCELLENCE JOURNEY

Introduction

Resources for practice management and business growth

You know Virtus Investment Partners for our client-focused investment solutions and differentiated active managers. Now, we are providing a practice management resource to help support financial professionals in structuring their business for success. Welcome to **The Excellence Journey**.

The Excellence Journey details best practices for building, growing, and transitioning a practice. It includes a wide variety of hands-on activities that incorporate research, insights, and tips that work.

Financial professionals have many demands on their time. The Excellence Journey encourages a process of stepping back and clarifying **what they offer, who they can best serve,** and **how to attract the right type of client for them.**

Although they may not think of it that way, financial professionals can be considered superheroes. Just like Clark Kent or Peter Parker, they are more than their everyday identities would suggest. They seek to work heroically to "save the day" for individuals and families, hoping to help them meet their goals and live without anxiety.

Strengthening three key areas

The Excellence Journey walks financial professionals through a process of reflection that can help them evaluate the business they have—and shape the business they want to have. Resources are grouped into three modules that each reflect an important aspect of practice management:

1. **The Practice:** This module helps professionals look within to identify their value proposition, areas of specialization, and authentic voice. It offers a process of self-discovery that is appropriate for those who are just starting out, as well as those who wish to evaluate where they are and where they want to go. Resources include:
   - Writing a biography
   - Creating a successful value proposition
   - Building a capabilities menu
   - Identifying the ideal client profile
   - Developing a client service model

2. **The Client:** This module enables professionals to craft their message and enhance the way they serve clients. It builds on the value proposition work to help set the right tone for new clients—and recalibrate legacy relationships. And, it includes guidance for appreciating current clients while encouraging referrals. Resources include:
   - Anticipating client needs
   - Communicating effectively with clients
   - Designing a client onboarding kit
   - Asking for referrals
   - Hosting successful client appreciation events
3. **The Prospect:** This module offers tools to help professionals raise their profile and build their reputation in the community. It describes analog and digital ways to share their unique message and value proposition in pursuit of new potential clients. Resources include:
   - Successfully growing a network
   - Email marketing
   - The newsletter revisited
   - Making a mark in the community

Our presentation describes each module in more detail and delves into the value of each resource.

Flexible and customizable resources

The Excellence Journey is flexible. The resources can be used as each professional sees fit. No two practices are alike, and no two people will use The Excellence Journey in the same way. Regardless of which elements they use, the result seeks to be a more intentional approach to their business, their process, and their services.

Partner with Virtus Investment Partners

At Virtus, we are dedicated to helping firms build a durable business with managers who pursue superior risk-adjusted returns over full market cycles.

Now, in addition to differentiated investment solutions, we are offering a practice management and business growth solution. Visit **virtus.com** to learn more about complementary educational resources that can be used with clients.

Call us at
1-800-243-4361
or visit **virtus.com**
to get started on
The Excellence
Journey.

