FITTS

amplifying the heart of financial services

engaging keynotes and workshops from anywhere

Sheri's in-person and virtual presentations and workshops are designed to help teams avoid marketing traps and time sinks and apply a fresh approach to defining value for clients and prospects. These programs are customized to address each organization's industry-specific challenges and are delivered in whatever format best suits your needs, from pre-recorded custom sales training to live or virtual keynotes with engaging pre- and post-event attendee chats and one-on-one follow-up.

meet sheri

Sheri Fitts, founder/CEO, is a compelling public speaker and financial services marketing, sales and brand guru whose mission is to amplify the heart of financial services. Sheri harnesses the power of emotional connection to help financial professionals create more trust in their client relationships and make their engagements more meaningful to their businesses, and more impactful to their bottom line. Her deep expertise in the retirement plan and wealth management industries, gained over nearly 30 years on both the buy and sell side as well as starting two companies, gives her special insight into what drives investor behavior and sales. Her latest industry innovation, digitalEQ™ (Digital Emotional Intelligence), is Sheri's highly personalized approach to individuals and organizations be unforgettable with thought leadership, branding, marketing, presentations and more.

In 2016, Sheri authored and published Deconstructing Digital: Simple Ways to Connect with Your Next-Generations Financial Clients, a guide for advisors to navigating the digital realm. And, as the host of the Women Rocking Wall Street podcast, Sheri is championing diversity, gender pay parity and the critical need to include women in corporate boardrooms.

A compassionate technologist and entrepreneur (since age five, when she made and marketed her own rose-scented perfume door-to-door), Sheri is leading the way forward to bring feelings and emotions to financial services—the key to reimaging how advice can be delivered to more people, many of whom need guidance. For a large part of her young life, and as a young single mom, Sheri struggled with financial insecurity. Sheri became a graphic designer at an investment advisory firm in the 1990s and saw for the first time how the financial services industry can make a real difference in people's lives. She realized her life's work was to get the word out that everyone needs a better relationship with money.

Sheri, her husband Greg and their Newfie, Fezzig Andre Fitts-Haworth (yes,The Fezzig from Princess Bride!), love exploring the outdoors in Portland and the Pacific Northwest. Sheri takes regular morning walks up Mount Tabor Park (an extinct volcano), casing the farmers' markets and cooking something delicious, stand-up paddle boarding, Pilates, and working in fused glass in her art studio are her passions. And coffee, made just so. Creativity and exploration are what drives her.

bios

short

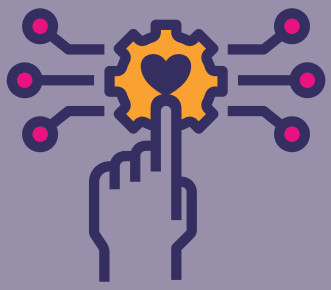
To survive the disruptive sea change that's happening across the financial services industry, you need to uncover and emotionally articulate the life transformations you deliver each day to your clients. Sheri not only believes that ideas and empathy are an advisor's true currency — she's been advocating it for nearly 30 years. An internationally recognized financial services speaker, success coach, social media expert (Deconstructing Digital), and visionary pioneer of digital emotional intelligence (digitalEQ™), she's helped financial services and fintech firms build brands, deepen client relationships, and drive sales and revenue growth. As the host of Women Rocking Wall Street, Sheri has championed gender-pay equity and the critical need to get more women into the boardroom.

long

In the current disruptive sea change that's happening across the financial services industry, every interaction with clients and prospects is taking on new urgency, whether conducted in person or virtually. Sheri Fitts is a financial services marketing, sales and brand solutions expert who's challenging the way that financial services and fintech firms think about how they sell. An internationally recognized speaker, success coach, social media strategy author (Deconstructing Digital), and pioneering developer of digital emotional intelligence (digitalEQ™), she's helped financial services and fintech firms build brands, deepen client relationships, and drive sales and revenue growth.

From Utah to the UK, Sheri has shared her expertise as an enterprise-level marketer and small business owner with enthusiastic and engaged audiences. She's always passionate about exploring new ways to help industry leaders broaden their sales reach and marketing effectiveness. Going beyond talking-head delivery, Sheri consults industry leaders and their teams on how to radically shift their approaches to attracting best-fit clients and drive sales and retention goals.

Firmly believing that leading with the heart instead of the head is the best path to sustainability and growth, her firm, Sheri Fitts & Co, is once again innovating financial services sales and marketing with digitalEQ™, a turnkey virtual sales and marketing solution that offers financial professionals the digital tools and technical command they need to evolve towards more empathetic and personalized client engagement.



Seizing Opportunities with digitalEQ™

If emotional intelligence (EQ) is the ability to discern, comprehend and manage our own emotions as well those of others, digitalEQ is the ability to evolve and apply EQ through digital channels. With attendance limited to 50 or fewer participants, the hands-on digitalEQ™ Workshop offers a deep dive into the digitalEQ playbook, ultimately culminating with each attendee crafting a personalized action plan. With facilitated discussions and exercises in how to foster EQ in digital as well as real-life meetings.

Attendees will discover

- How emotionally driven storytelling and experiences change biochemical responses in the brain that deepen connections and relationships
- Why brands that effectively communicate emotion often lead their industries in terms of topline growth and market share

Key benefits

- Close more business by fusing technology, empathy, marketing strategy and brand equity with emotional intelligence
- Increase your team's productivity during a time of client transitions by communicating EQ in every interaction
- Empower your team to deepen relationships by leveraging EQ—even in a fast-paced business environment
- Discover how empathy and patience lead to more constructive conversations, making clients happier and relationships potentially more profitable

Format

The insights and ideas fueled by the digitalEQ™ methodology can be delivered through both workshop and keynotes focused on personal branding, sales, marketing and diversity and inclusion efforts.

Out Care Your Competition

The Power of a Customer-Centric Brand

Think of today's great consumer brands — Apple, Starbucks, Zappos. These companies have profoundly shifted their focus from commodities (cell phones, coffee, shoes) to the customer for long-term sustainable competitive advantage. The "secret sauce" these companies are bottling is simple: they get personal and connect at a human level. They create fierce brand loyalty, and those ecstatic fans willingly refer new customers.

By focusing on exceeding expectations and "out-caring" the competition, attendees can drive new relationships and growth for their firms. To be successful, organizations must deliver a customer-centric brand experience that leads to referrals and a competitive advantage for their practice. Out Care Your Competition attendees will discover the essential elements that can turn customer-centric businesses into referrals and new growth for their practice.

Attendees will discover

- How to link customer discovery to strategy development
- What it takes to understand customer needs and "create the experience" that goes beyond selling
- Strategies for more impactful customer relationships

Key benefits

- Align product and service delivery with a client-centric strategy
- Identify brand touchpoint opportunities
- Creating a winning customer experience
- Provide a memorable experience for all humans that engage with thier brand
- Build word-of-mouth into their brand

Format

This session can be offered as a one-hour high-level breakout, or a three-hour deep dive training.

Your Brand. Your Business. **Your Bottom Line.**

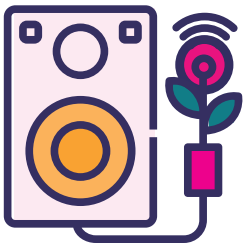
New financial services regulation has flattened the competitive landscape. Soon, every advisor will be a fiduciary and levelized comp the norm. Fees will be compressed as the robo-onslaught continues. This session will show you how to change the conversation by rethinking the power and value of brand.

Attendees will discover

- How to locate the intersection of brand and the "perceived" value of your services
- What's the secret code behind a passion-powered brand?
- How to generate deeper client relationships and earn new business
- The necessary steps to creating a unique brand and infusing it into all your sales and service efforts

Key benefits

- Build brand equity by framing your value proposition in terms that elicit an emotional response to your brand in client interactions
- Improve your close rate by finding more best-fit clients, uncovering true needs and validating the connection between those needs and how you want to spend your time
- Deepen client relationships in ways that increase client satisfaction and helps earn you new business
- Infuse passion into your brand, making it the cornerstone of your sales, client onboarding and service activities



Operation: Amplify

A Thought Leadership Masterclass for Financial Professionals

The financial services industry is grappling with a longstanding problem, and it's getting worse. We face a plummeting trust curve that makes investors and prospects hesitant to connect. Financial professionals have also gotten a bad rap as being pushy, aggressive, and self-centered. Whether they explicitly say it, prospects may think, "I don't even want to have a conversation, because you're just going to try to sell me something."

If you're ready to catapult your business development efforts with the genius you already have inside you, Operation: Amplify could be for you. This three-day immersive experience is designed specifically to help you step into and package your brilliance by giving you the tools, frameworks, and methods to convert your years of hard-earned knowledge into thought leadership that showcases you as an industry leader.

Attendees will discover

- Phrase your understanding of client problems in terms that transcend money. Emotions are at the root of all decisions and together we'll craft your value proposition and positioning statement so that it touches their hearts and minds, instead of just their wallets
- Design your first-impression experience and customer journey that enables you to meet both the financial and emotional needs of your clients and prospects. Having a clear vision of how you want to be perceived is the key to being remembered
- How you express yourself in both the written and spoken word to raise your level of awareness in your marketing to create powerful and lasting connections from your first engagement—face-to-face or digital

Key benefits

- Focus on client satisfaction and retention (the true pillars of profitability) by having prospects seek YOU out
- Grow your revenue with stickier relationships that allow you to cross-sell your service and prove your value—over and over again
- Automate your outreach without raising compliance red flags or losing the critical emotional connection with your audience
- Deepen client loyalty, so that referrals materialize without having to directly ask for them
- Remove friction from your sales process, so you spend less time breaking down resistance and more time having conversations that matter

more presentations and workshops

Lights, Camera, SELL!

Compete effectively in the virtual environment

The Power (and Necessity) of Your Personal Brand

Solidify your message and amplify your influence

Mastering New Media

Using digital, video and social media to secure sales

Social Selling

Optimizing your LinkedIn presence and outreach for sales success

"It was a fun presentation packed with incredibly useful information. Every financial services professional should learn this stuff!

G.K., Vice President
DCIO Division of
Leading Asset Management Firm

in great company
representative client list

charles SCHWAB
John Hancock
Morgan Stanley
Advisor Group IN YOUR CORNER
Ameriprise Financial
Principal
CAMBRIDGE
securian FINANCIAL
Cetera FINANCIAL GROUP
Nationwide
MDRT
TheStandard
BlackRock
Putnam INVESTMENTS
LADENBURG THALMANN ESTABLISHED 1876
LPL Financial
MFS
Commonwealth

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