
At Janus Henderson, we seek to benefit clients through the connections we make. This includes the flow of ideas between investment teams, the insights we offer to inform clients and our engagement with companies to make a positive difference.

This is central to what active management stands for and to the outperformance we seek to deliver to clients.

We're invested in connecting.



INVESTED IN CONNECTING

1

Active because active matters

We selectively invest in what we believe are the most compelling opportunities. Our investment teams are free to form their own views and seek to actively position portfolios to connect clients with their financial goals.

2

Global strength to deliver local solutions

We offer true global reach with a presence in all major markets, combined with the responsiveness, tailored solutions and personal touch you would expect from a local partner.

3

Empowering clients with *Knowledge Shared*

We connect our clients with insights and knowledge that empower them to make better investment and business decisions.

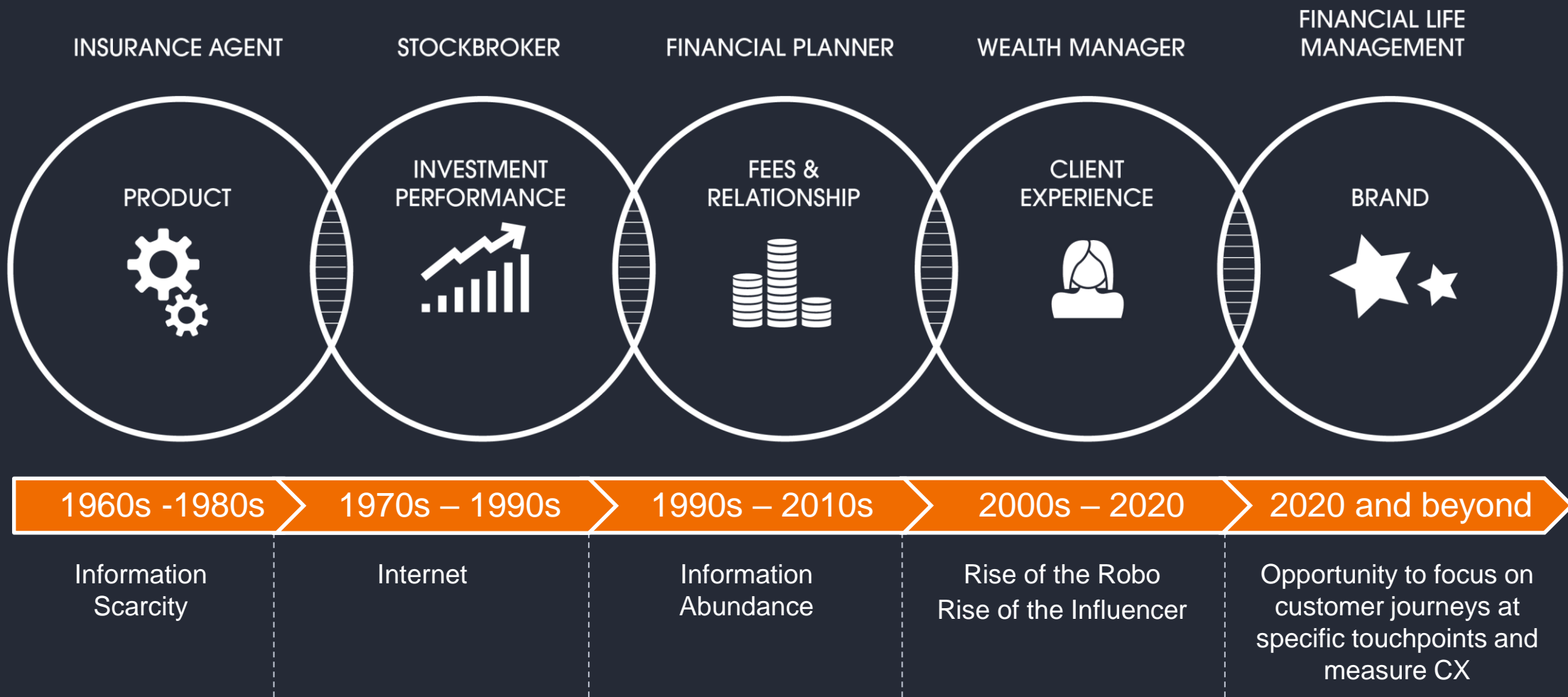




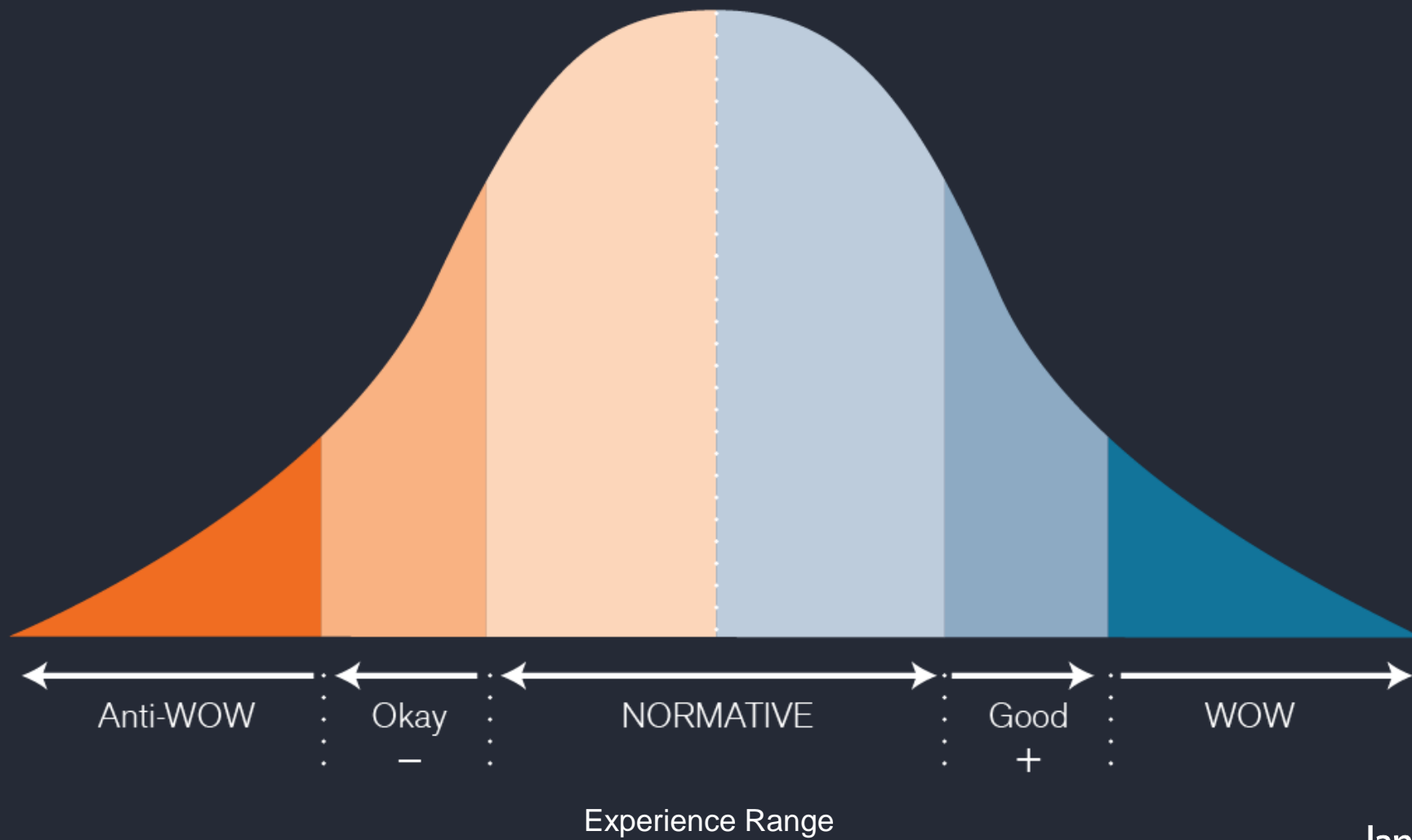
MODERN PROSPECTING

How to create the ultimate client experience

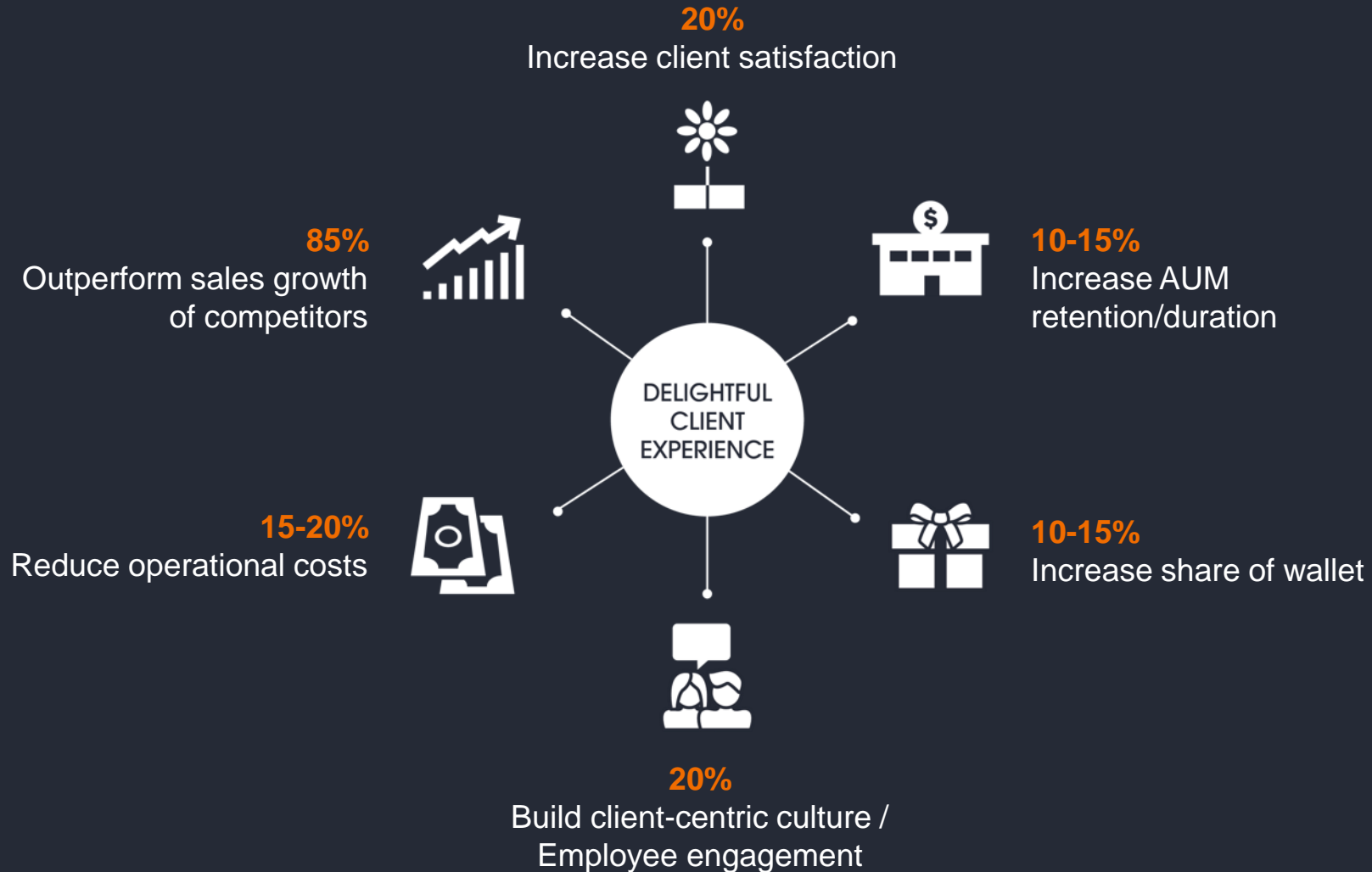
THE FUTURE ISN'T WHAT IT USED TO BE



CLIENT EXPERIENCES CURVE



WHY DOES IT MATTER?



PROGRAM OVERVIEW

1 Discover

2 Design

3 Deliver



The background of the slide features a dark, semi-transparent overlay over a photograph of a desk. On the desk, there is a black alarm clock with a white face, a pair of black-rimmed glasses, and several sheets of paper with blue line graphs and bar charts. A red vertical bar is visible on the far left edge of the slide.

DISCOVER

What is actually happening within your book of business?

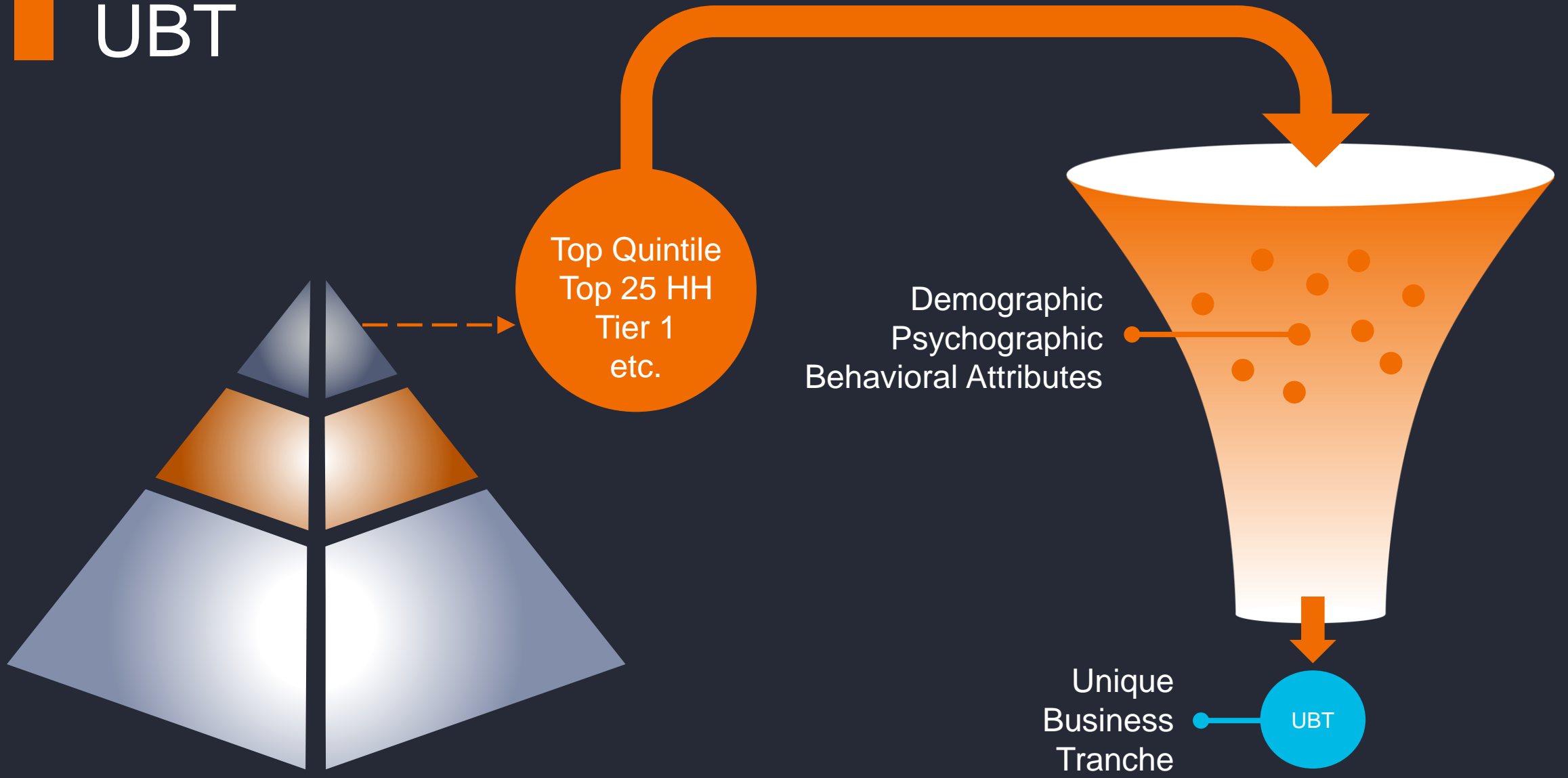
1. Segmentation
2. Analysis
3. Research

SEGMENTATION

What is actually happening within your book of business?

- 1 | Download client list and quintile by revenue
- 2 | Consider additional quantitative and qualitative attributes that impact the relative client value
- 3 | Total each client score and assign Tiers

UBT



RESEARCH

Interviews
Social Media



Online Competitive
& Firm Review



Client Core Needs





DESIGN

What would your ideal future business look like?

1. Client Personas
2. Experience Journey
3. Multi-Touch Plan & Content

CLIENT PERSONA

Dual Income, No Kids (DINK)



DEMOGRAPHICS

Life Stage:
Age Range:
HH Revenue:
Geographic Location:
Profession:

PSYCHOGRAPHICS

Personality Type:
Interests:
Beliefs:
Motivation:

BEHAVIORAL

Needs

- Behavioral finance
- _____
- _____
- _____

Frustrations

- Lagging technology, paper
- _____
- _____
- _____

Influenced By

- Podcasts (Redefining Wealth)
- _____
- _____
- _____

Values

- Health & wealth
- _____
- _____
- _____

For a Successful Relationship

- Create educational opportunities
- _____
- _____
- _____

Top of Mind

- Social & environmental challenges
- _____
- _____
- _____

CLIENT EXPERIENCE JOURNEY

Universal

Community
Social Media
Website
Location
Brand

Prospect

Office Amenities
Proprietary Process
Discovery
Education
Follow-up

Onboarding

Acct Setup
Communications
Staff Introductions
Technology
Expectations

Ongoing

Review Meetings
Events
Appreciation
Client Feedback
Value-Add Services

MULTI-TOUCH PLAN

1

Webinar

Scripted Topic:

DINK Money
Mindset

2

Digital Content

Video
White Paper
Blog Posts
Checklists
Quick Ideas
Quotes
Reminders

3

Social Media

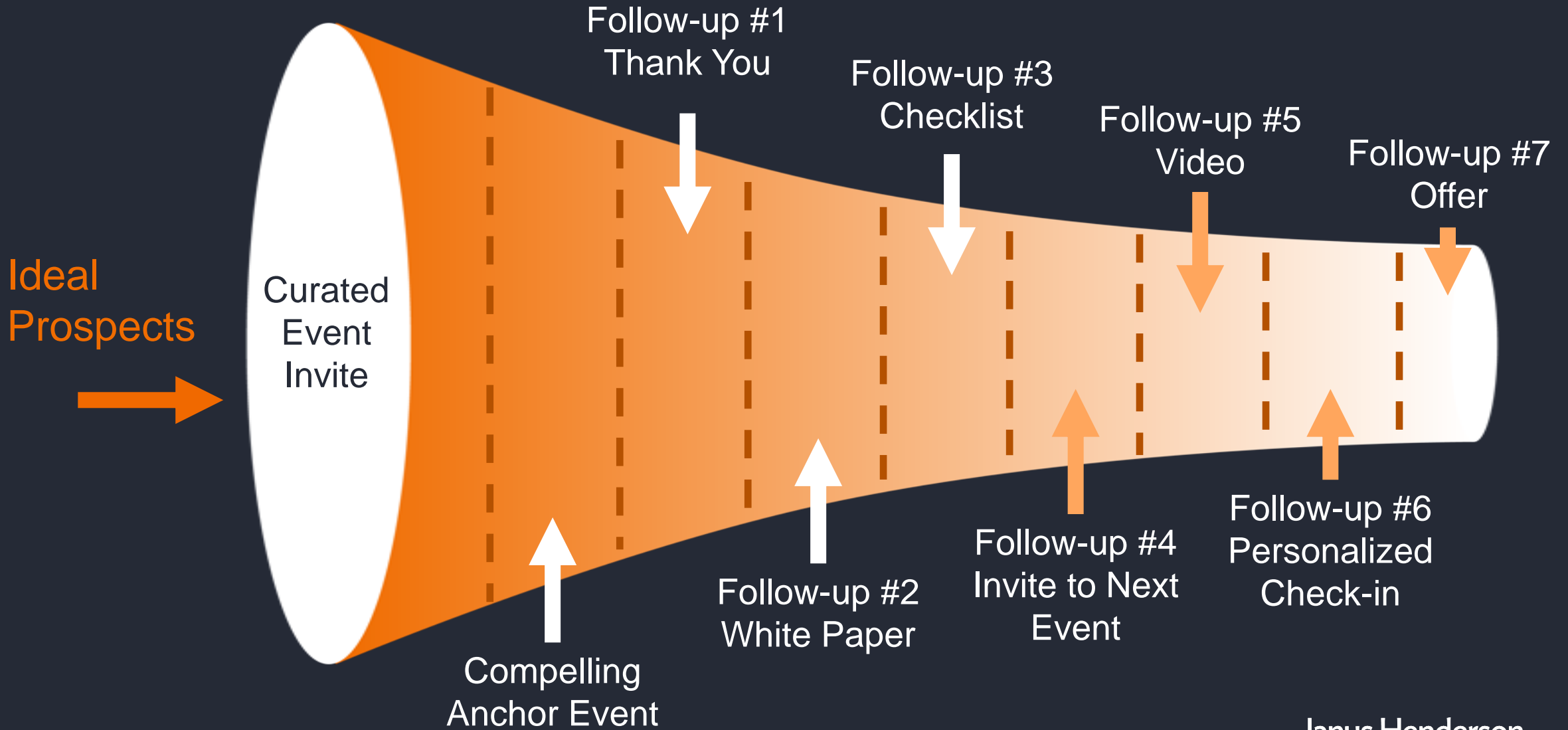
Posts
Stories

4

Follow-up

Prospect Campaign

MODERN PROSPECTING



SERVICE MATRIX:

Who gets what and when they get it

	Tier 1	Tier 2	Tier 3
INVESTMENT MANAGEMENT	•	•	
CASH FLOW & DEBT MANAGEMENT	•	•	•
EMPLOYMENT BENEFIT ANALYSIS	•	•	
BUSINESS OWNER PLANNING	•		
TRUST AND ESTATE PLANNING	•		
TAX STRATEGY	•		
RETIREMENT PLANNING	•	•	•
FULL FINANCIAL PLANNING	•		
FAMILY MEETINGS	•		
ACCOUNT AGGREGATION	•	•	•

A photograph of three chefs in a kitchen, wearing white uniforms and hats, focused on their work. They are standing behind a counter, with various kitchen equipment and ingredients visible in the background. The image is overlaid with a semi-transparent dark grey box containing text.

DELIVER

Put the plan into action

1. Implement Plan and Track Progress
2. Make changes based on measurable metrics
3. Rinse & Repeat

DON'T BITE OFF MORE THAN YOU CAN CHEW

Delivering on your experience is a three-way balancing act

Resources

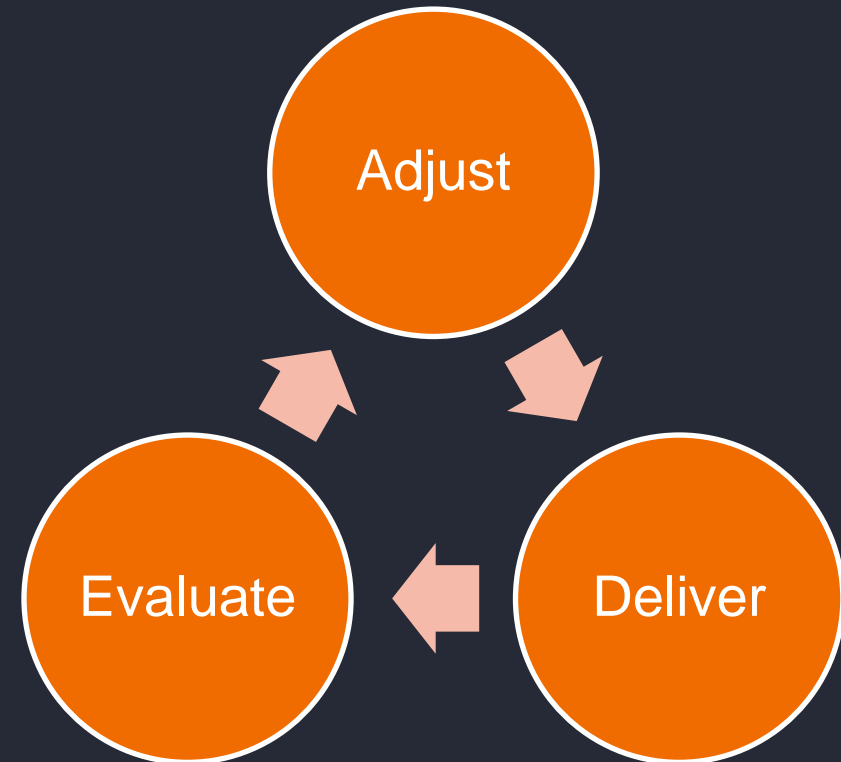
- Who do you have to do the work?
- How much time do they have?

Efficiency:

- Which things are easy and impactful?
- What can be 'automated'

Effectiveness:

- Are you seeing the expected outcomes?
- Who is getting your most valuable energy?



COMPELLING REASON



TAKE ACTION

1 | Nominate a team project lead

2 | Identify goals, strategies and obstacles

3 | Calendar the work



Connect with us

Knowledge Labs provides timely insight and perspective, programs designed to hone your skills and a team of accessible experts committed to helping you exceed expectations – in business and in life.

To engage with us, **contact your Sales Director or call 800.668.0434.**

Visit janushenderson.com