Dimensional

Mastering the Fee Conversation

Business Strategy Training Offered Through Dimensional 360®

This interactive workshop combines research data, strategic planning, and practical exercises to help advisors discuss fee changes with their clients.

Details

The full workshop is three hours in total and is recommended to be held in a single session, ideally with full in-person attendance. We can tailor a workshop for a small advisor group or conduct a firm-wide event that includes leaders (we recommend a minimum of five participants). The event will require active participation, including solo reflection, workbook activities, and team practice.

Benefits

- Gain a deeper knowledge of industry pricing and how firms can competitively position their fee structure.
- Develop 4S Framework skills to more effectively communicate firm pricing to clients.

Objectives

- Understand the fee landscape using data from Dimensional's Global Advisor Study.
- Provide advisors with the knowledge and skill set to have conversations with clients around fees.
- Use the 4S Framework as a guide to answer common client questions around fees.

Participants

- Firms planning to change fees
- All client-facing advisors and support staff members

Workshop Sample Agenda

Three-Hour Sample Workshop

9:00–9:15 am	**Introduction**
9:15–9:45 am	**Turning Data into Talking Points**
9:45–9:50 am	**4S Framework Introduction**
9:50–10:00 am	*Break*
10:00–10:20 am	**Scripts**
10:20–10:40 am	**Stories**
10:40–11:00 am	**Sketches**
11:00–11:20 am	**Supplements**
11:20–11:30 am	*Break*
11:30 am–12:00 pm	**Practice Sessions**

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