**Goal**: To obtain testimonials from 3 different target markets - Aspirational Mass, Emerging Affluents, and Established Affluents that are aligned with Rampver’s Core Propositions with the goal of each being able to state how Rampver was able to provide value to them, their families and/or their businesses.

**Target Markets:**

Aspirational Mass - focused on Competent Advisory (Which financial tips and lessons struck them the most and continue to apply in their lives)

Emerging Affluent - focused on Centralized Access (How Rampver’s centralized and diverse product-line structure able to help them reach a milestone in their life)

Established Affluent - focused on Exceptional Service (How Rampver’s corporate solutions have helped them enhance the performance of their business/es)

ACTIONABLE STEPS (Testimonial Journey)

**1. Text the client and mention help needed. Ask if he/she is free to take your call to further discuss.**

Help needed: To provide valuable feedback highlighting the value Rampver brings to them

Sample Spiel:

*Hi ma'am/sir, good morning! Kamusta po kayo? Maam/sir, I just want to inform you that there is an important matter we’d like to discuss with you and this involves your participation in our upcoming new website that is to be launched soon! Kindly let me know when you are free to take my call. Thank you!*

**II. Discuss objective and details via call**

Objective: Get client to participate and obtain valuable feedback

Talk points to mention:

* Development of new website (mention specifically the feedback section in landing page)
* Client’s feedback must….
  + Indicate how Rampver brings value to client (Note: Guide questions will be sent via text to give them ample time in constructing their feedback)
  + Be short and straight-to-the-point (3-5 sentences; limit to 50-100 words only)
* Inform client that we will be revising their feedback
* Mention that we will be needing a decent picture of them will be posted in the website
* Guide questions will be emailed/texted and inform the client that he/she must email back feedback together with their attached picture that is to be posted on our website.

**III. Text the guide questions to client**

Sample Spiel:

*Hi ma’am/sir, thank you for taking the time to take my call and for agreeing to participate in this new milestone of ours. We truly appreciate your willingness to participate. As mentioned via call, kindly refer to these guide questions to help you construct your feedback about us:*

1. *<guide question #1>*
2. *<guide question #2>*

Competent Advisory Guide Questions:

* What was Rampver’s role in your personal financial journey?
* Out of all the financial lessons and wealth management advice we’ve taught, which lesson or advice struck you the most?
* How are you applying this lesson/advice in your life and how is this helping you improve the way you handle your finances?

Centralized Access Guide Questions:

* Which products have you availed here in Rampver and how has this helped you achieve a certain milestone in your life?
* With Rampver’s unique value proposition of being a complete one-stop shop of financial products and services, how did this impact your decision in availing the products you currently have?

Exceptional Service Guide Question:

* Being a Rampver client for X years, what can you say about the products and services Rampver has served your business with?
* What significant change did you notice and how did these products/services help improve your business?

**IV. Review client’s feedback, revise and have it approved**

**V. Send token of appreciation to client**

Assignments:

EVM: assigned to contact ***aspirational mass*** market (TBD)

KAS: assigned to contact ***emerging affluent*** (Ms. May Ramos)

SLC: assigned to contact ***established affluent*** (Dr. Sixto)

Token Options (to be delivered)

* Bag
* Food (Pastries, Food, etc.)
* Money incentives
* Vouchers/Gift certificates
* Personalized merchandise items

**CLIENT FEEDBACK**



Dr. Sixto Carlos, Veterinarian

*“Rampver makes it easy for me to get health insurance for my staff. They’re brand agnostic, so I get to choose the best for our needs. I’ve been a client for X years and through them, I’ve built a sizable portfolio I plan to enjoy during my retirement years!”*



Vanessa Marie Nicole Pollard Ibaviosa

*“I have always been hesitant when it comes to investing and being introduced to Rampver Financials gave me the security and assurance that my investments are safe. In fact I have started encouraging others to invest as well and already have a couple of accounts for my god children.”*