KRISTINHARAD

How To Systematize Your Client Communications

Save Time, Money, Energy & Your Sanity!

BONUS

3 FREE videos that teach 6 Steps to create your lead-to-lifelong client marketing system.

Welcome!

Working with clients is one of the most rewarding parts of a financial advisory practice. Yet so often we do not devote enough time to reaching out and communicating with our clients. We may even take them for granted.

Client relationship marketing matters for many reasons. You demonstrate your value and role early on, build trust through consistent communications, maintain contact and deepen relationships, and increase engagement – attracting in more business.

A well designed system will streamline your business resources and save time, money, energy & sanity! It will allow you to make time to contact each person, know when, who, how and about what to contact, and use your repetitive work to your advantage.

I'm glad you decided to take your relationship marketing to the next level with my Client Communications System.

Sincerely,

Kristin

Kristin C. Harad, CFP®
Founder, VitaVie Financial Planning
Creator, Complete Relationship Marketing Blueprint

This Client Communications is just one of the many marketing training tools for entrepreneurial advisors that Kristin offers! Learn more at http://kristinharad.com/engage

www.facebook.com/kristinharadfan

www.linkedin.com/in/kristinharad

@KristinHarad

STEP 1

Outline Your Client's First Year

1. How many meetings do you hold in the first 12 months?

2. What are the meetings? Describe below. Be clear on the objective for each meeting. Outline the full process that is possible even if some clients do not engage in all meetings.

Meeting Name	Timing	Objective	Action Required By Client

3. What Communications are already part of your process that a client receives throughout the first 12 months? List below. Include timing, mode (email, mail, phone).

4. When do you need specific action from a client to be able to deliver your service(s) in a timely manner?

5. Where do you find drop off from client participation in the first year?

6. Where do you get stuck in follow-up with clients in this first year?

STEP 2

Structure Your 1:1 Communications.

In this step you lay out the exact sequence of communications that you want your system to deliver to your individual clients based on where they are in their relationship with you. You can leverage what you already have in place and then add in touch points (email or phone call) to target the areas where you need client action, you see drop off, or you often get stuck.

This step does not include the "cultivate" communications such as newsletters or educational articles that go to all clients regardless of stage of relationship.

Your Communications System:
Using the 1:1 Communication Chart:
1. Fill in your Year 1 meetings in Column A.
2. Drop in the communications you already send (From Step 1, Question 3)
3. Identify the timing of actions required from Step 1, Question 4; add in communications for those critical time periods.
4. Do the same with Step 1, Questions 5 and 6. What communications can you put in your system to prevent dropoff or to help you?

1:1 Communications

MEETINGS	Timing	Message	Mode	Call to Action / Key Copy Points
MEETING 1	*DAY 0*	*Summary/Immediate from meeting*	*EMAIL*	*Here is what we discussed, your actions*
	Day 1	*HOW DO YOU FEEL?*	*EMAIL*	*Share any missing pieces, thoughts. goals*
	Day 3	*WHAT WE STILL NEED*	*EMAIL*	*Upload your documents; send in paperwork*
	Day 7	*What to Expect in Next meeting*	*EMAIL*	*We'll discuss your plan, investment policy; funding paperwork*
MEETING 2	*DAY 14*	*Summary/Immediate from meeting*	*EMAIL*	*Here is what we discussed, your actions*
	1 month	*Implementation follow-up*		*We have you up and running*
	2 months	*Stuck?*		*Give us a call if you need help*
MEETING 3	*3 months*	*Summary from Meeting*		
	6 months			
MEETING 4	*9 months*	*Summary from Meeting*		
	1 year	*Check in / Anniversary*		*Schedule a meeting? Changes? Additional funds?*
MEETING	*Y2/3 mo*		*EMAIL*	
	Y2/6 mo		*EMAIL*	
	Y2/9 mo		*EMAIL*	
	2 YEAR	*Check in / Anniversary*	*PHONE CALL*	*Schedule a meeting? Changes? Additional funds?*
MEETING	*y3/3 mo*		*EMAIL*	
	Y3/9 mo		*EMAIL*	
	Y4/3 mo		*PHONE CALL*	
	Y5/3 mo		*PHONE CALL*	

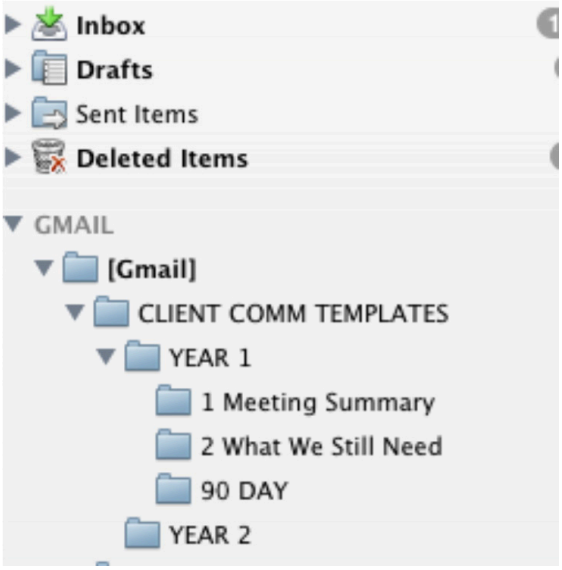
EXAMPLE

STEP 3

How To Launch and Use Your System

1. Draft the template for each communication you send. These do not have to be lengthy communications. Your goal is to touch base. Have a few introductory lines, ask a question or two, and instruct on any action the recipient should take.

2. Make your templates easy to access. If you use Outlook, you can set up folders to hold each of the templates. You could also use your CRM or email management system if you want to set up more formalized technology or keep the templates in a Dropbox folder or Google Documents folder.



3. Enter all Clients' birthdays (and anniversaries if you want) into your calendar and set a reminder for the prior day. If you can, have a team member or support person do this communication for you. Simply pull out the template, personalize it with first name, and send. If this client is one you would call, note it in the calendar when you set up the system.

4. Set your time each week where you focus on sending communications and/or assign a team member the responsibility of sending the email/making a call. You can set up your CRM to remind you (or send the email automatically) or you can track your client communications on an Excel spreadsheet.

The Year 1 people will require more time, but the veteran clients (>1 year) will take only a few minutes a week. Address 10 people at a time. Don't worry if you do not hit the exact timing of the system. Your dates are a guideline to ensure timely and consistent communication.

5. Review the system after 60 days to see how you are progressing. Have you hit the communication targets you set for yourself? What's working well? What has to change? What would you like to automate? Where can your CRM help you?

Creating an effective Client Communication System often requires trial and error to find the right fit for you and your team. Once you identify the system that works for you, you'll experience the relief that comes from knowing you are effectively communicating with your clients on a regular basis, all the while enjoying the freedom of not having to reinvent the wheel each time!

Keep Up-To-Date With My Latest Marketing Advice.

Explore more marketing training options designed for advisors just like you. Visit http://kristinharad.com/engage.

KRISTIN**HARAD**