

# Mastering the Stay-in-Touch Communication

by Susan Kornegay, CFP®; and Adam Kornegay, RCC

**SAVVY PLANNERS KNOW** that growing strong client relationships is dependent on effective, ongoing communication. Clients frequently cite not hearing from their planner as a reason for seeking someone else. So what are your clients looking for, and how can you provide it in a way that works for them and you?

Begin by asking clients about their preferred methods of communication. For example:

- Do you prefer email or standard mail?
- What is your preferred email address?
- Are you more comfortable receiving encrypted email to ensure privacy?
- Are you good with text messages?
- Which phone number(s) is/are best to use, and do you mind if I leave messages on your voice mail?
- Are you comfortable with webinars and videoconferencing?
- What time of day is best to reach you? Do you prefer scheduling phone appointments or are you fine if I pick up the phone and call?
- Are you on social media, and if so, are you open to our connecting there?

Add their preferences to your client relationship management system and make certain the entire team is committed to checking those client preferences before reaching out to them. There are few things worse than asking someone how they want something done and then ignoring what they've told you.

Communicating with clients on their personal financial needs is

important, but what about contacting them simply to stay in touch? The frequency of such contacts will vary by personal preferences, and some strategies can help ensure these just-to-stay-in-touch communications are relevant and meaningful.

**CRM tags and Google News alerts.** While adding your clients' communication preferences to your CRM, you can also create "tags" to help you connect on topics that are of interest to them. Examples include their hobbies, recreational activities, family interests, pets, schools, sports teams, and vacation travel. Use the tags to find all your clients with a particular interest for efficiency.

Look online for other potential connection points. For example, if you notice on Facebook that one of your clients is a big Chicago Cubs fan, set up a Google news alert to be notified about team happenings. As you find relevant articles or videos, email a link along with a brief note to let that client know you thought of her when you came across it.

**CRM reports.** Create a weekly or monthly CRM report based on client birthdays and anniversaries to learn which clients to call to personally wish a happy birthday or recognize a special wedding anniversary.

You can also pull a report from your CRM of anyone with whom you've had no contact for a specific time, such as the last 30, 60, or 90 days. Look for opportunities to connect with those clients on something relevant.

**Pre-approved articles.** Instead of sending generic newsletters, look for

pre-approved articles (from a compliance standpoint) that would provide value to specific groups of clients. For example, clients with teenage children or grandchildren may appreciate articles with personal finance education tips for young people or smart ideas for finding merit-based scholarship funds for college. Business owners, newlyweds, and divorced or widowed clients are likely to appreciate content that addresses their specific concerns. Share such articles in a brief email, outlining your own perspective.

**Social media.** Of course, LinkedIn, Facebook, and Twitter enable you to connect with clients and prospects, and communicate relevant information about yourself and your practice. Consider posting photos and descriptions of individual or team celebrations (a new employee, babies, graduations, and weddings), professional accomplishments (certifications, published articles, interviews, and awards), and community involvement (charitable causes and events).

While technology is sometimes seen as creating barriers to effective personal communication, it can also be harnessed to enable you to engage with your clients and prospective clients in ways that can be more personalized and effective than ever before and at a much lower cost in terms of time and dollars spent. ■

*Susan Kornegay, CFP®, is a partner at Pathfinder Strategic Solutions. She has more than 30 years of experience as a financial adviser, branch manager, and practice management consultant. She is a coach, along with Adam Kornegay, RCC™, in the FPA Coaches Corner.*