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Beindispensable

Creating the 5-star experience for your clients

Rapport versus Report



Spend time getting to know your clients



Be intentional in-between meetings to reach out



Make certain your client knows you and your firm



Set proper expectations and meet them



WOW your clients



Become more than their retirement advisor – be their business partner



Create an "untouchable" relationship

R P A G Spend time getting to know your clients

How do you do that in a Fiduciary Investment Review?

- ✓ Understand the Committee dynamics
- ✓ Be respectful but ask questions
- ✓ Let them know your interests, hobbies be real
- Remember we are all just people at the end of the day regardless of title
- ✓ People like others to take interest in them

Treat every client with the mindset that you would have with a personal relationship or a first date – be excited to get to know all about someone and exude interest and depth and understanding – ask, ask, ask, ask questions!!!

Be intentional between meetings to reach out

How do I do that?

- ✓ Divide your clients by 12
- ✓ Set a calendar invite to call/meet with 1/12 of your clients each month
- ✓ Just check-in, see how they are doing and if there is anything we can be doing for them
- \checkmark Share something that happened in your life
- Let them know you saw their logo/marketing, you used their product, you visited their store
- Good to have a Google alert on each client to know if something is happening with them

Make sure your client knows you and your firm

✓ Be open and vulnerable

- ✓ Share with them what you do in your spare time – coach, volunteer, non-profit work, etc.
- Talk about the depth of resources you have through your team
- ✓ Remind them that you are their 'go to' when they have questions or making changes

Every client interaction you are selling yourself and your firm

Set Proper Expectations and Exceed Them



Review the Agreement with client at first meeting



Periodically refresh everyone's knowledge of the engagement

Do what you say you will do when you say you'll do it – set realistic expectations

Follow up meetings, and phone calls, with written confirmation of what's to be done – create paper trail of expectations



Repeat to confirm what you've heard from clients to ensure understanding

Learn how to say "no" with a "yes" - explain how it can be done Never fail to provide an update if a client is waiting for a response – proactively provide updates if response will be delayed

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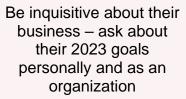






Be that person they call first – remind them of your depth of services

Share examples of how you have helped other clients achieve their business objectives





What keeps them up at night?

Promote the trainings you

offer to both participants and fiduciaries

Treat your clients like prospects and your prospects like a client