

Be Indispensable!

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

How do you do that in a Fiduciary Investment Review?

Spend time getting to know your clients

- ✓ 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
- ✓ 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



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



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



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***



Become more than their retirement advisor – be their business partner



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



Be inquisitive about their business – ask about their 2023 goals personally and as an organization



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***