

# Client Service Activities Overview

## Review Meetings

- A regularly scheduled, in-person client meeting.
- Review meetings are typically scheduled in 6-month or 12-month intervals.
- During the meeting, review financial and business matters, and reinforce key messaging.
- Holding review meetings with clients underscore the value you provide.



## Annual Service Call

- A regularly scheduled, outbound call, used to check-in with general client servicing which is made by the Assistant.
- This call should weave in Client Profile information for high value clients.

## Relationship Calls

- A regularly scheduled, outbound call, used to check-in with certain client in a consistent and proactive manner.
- Conversations are based on the Client Profile information.
- Relationship calls are typically scheduled in Quarterly, Semi-Annual or Annual intervals.
- Implementation of the relationship call will further your relationship with clients beyond business matters.

## Moments of Truth

- A procedure designed for you to acknowledge moments of truth, often with an appropriate gift, for personal and professional events.
- Demonstrate that you are paying attention to your client by recognizing their important life events.
- Moments of Truth recognitions are based on the Client Profile information.
- This is a high impact activity to enhance trust and build depth into relationships.

## Thanksgiving Cards

- Send a quality card with an inspiring message to the AAA and AA clients to genuinely show your gratitude.
- Ensure the message is *handwritten* and the envelope is hand-addressed.



## Birthday Cards or Calls

- An excellent opportunity to recognize a valued client on a special day.
- This high impact, time leveraged activity lets a client know that you are paying attention to them beyond just their business dealings with you.



## Special Event

- An exclusive event held to recognize the continued trust, loyalty and confidence of your best clients.
- Choose any type of event that you would enjoy hosting or attending with your best clients. Examples: a sporting event, dinner cruise, symphony, wine tasting.
- Special events may be catered to shared interests among clients. Use Client Profile information to find commonalities among top clients.
- The intent is to provide a shared experience that will be memorable.

## Annual Anchor Gift

- A procedure launched annually to recognize top clients for the value you place in their trust and relationship.
- Annual anchor recognitions often are created using the Client Profile information.
- Anchors are meant to create an anticipation of recognition by the client.
- For example, a holiday gift that you have always given to your best clients may be listed as the Annual Anchor.



## Articles of Interest

- A procedure that results in a relevant and interesting article being sent to a top client, with a personal note from the Advisor.
- Team members clip and file how-to and benefit-rich articles on non-business and business-related topics of interest and relevance to your clients.
- Articles relate to the Client Profile information.
- This will provide opportunities to connect on a level beyond financial matters and develop chemistry with your best clients.