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Heart of the profession

Susan Grice on changing
the lives of young
Australians for the better

THIS ISSUE

KEEP AN EYE ON THE INCOME / THE SECRET TO LIFELONG CLIENTS /
CONGRESS 2016 / INSURANCE THROUGH SUPER / SMSFS AND LIQUIDITY





The busy planner's secret to lifelong clients

Providing added value to your clients can be as easy as simply staying in touch with them. Gihan Perera provides four easy tips to do just that.

In a business environment where clients have more choices and information than ever before, keeping in touch with clients – and providing value – is not just about FoFA, the FSI Report, the Life Insurance Framework, the PJC Inquiry or compliance – it's just good business.

Do your clients only hear from you when you send them a statement or invoice? If so, you can do more – much more – to show them you're a valued partner in planning their financial future. Focus on touch points that give them real value in a non-intrusive way.

Here are four things you could do regularly.

1. DAILY Do something thoughtful

Every day, take 10 minutes to do something thoughtful for one of your clients – for example, send a Happy Birthday text, forward an interesting article you found, 'like' or comment something on Facebook or LinkedIn, send a thank you email, or introduce two people in your network to each other.

TIP: Use Nimble to keep track of your clients and have it prompt you with names of people/clients you haven't contacted in a while.

2. WEEKLY Send a thank you postcard

In an increasingly digital world, you will stand out by sending something physical. Print your own postcards with, say, a picture and an inspiring quotation. Use your own photographs or buy them online (Pixabay.com is free, and both

BigStock.com and iStock.com are very affordable). Add text to the picture using PowerPoint and save the slide as an image. Then send it to a local printer, along with your contact information for the back.

3. MONTHLY Write a high-quality article

Write an educational article for your monthly client email newsletter. This is something more detailed and valuable than the articles you publish in public places, like your blog or public email newsletter.

Even if you're not an expert writer, it doesn't take much to write a useful article, because you know so much that your clients want to know. You may even decide to write up a client case study, revealing how your advice helped the client. Remember though, you'll need to protect the identity of the client, so don't use their real name. It also doesn't hurt to seek approval from the client to publish their case study.

For inspiration, go to your local newsagent, pick up the latest issue of a popular magazine, look at the headlines on the cover, and adapt one of them for your use.

For example, a recent issue of a popular women's magazine had these headlines:

- Bye-Bye Belly! 3 new easy ways to lose it
- Party dresses that flirt for you
- Cameron Diaz – Even more reasons to love her

With a bit of creativity, these could become:



Gihan Perera

- Bye-Bye Debt! 3 new easy ways to lose it
- Super strategies that grow for you
- Self-Managed Super Funds – Even more reasons to love them

Of course, you have to be careful what you write, to avoid breaching legislation, dealer group rules, and so on. But don't let that stop you from writing at all.

4. QUARTERLY Run a client webinar

Every three months, run a special client-only webinar to give your clients a market briefing. You can present it yourself using internal experts or (better) invite external experts. Use this webinar to inform and educate clients, not to promote yourself. But of course, you promote yourself automatically by positioning yourself as an expert, an authority and a trusted adviser.

Two bonus ideas

1. Invite key referral partners as expert guests, and ask them to invite their clients as well. It makes them look good to their clients, makes you look good to yours, and gives prospective clients a taste of what you do.

2. Keep the webinar private for your clients (that's the point – to add value to them), but allow them to each invite a friend or two. This is better than just asking clients for referrals, because the client is doing a favour for their friend, not for you.

Which of these ideas can you use?

Even if you can't use these exact ideas, don't discard them too soon. For example, if you don't know how to run webinars, take the time to learn – it's not hard, not expensive, and the benefits far outweigh the cost of the initial learning curve.

Whatever you do, make sure you're creating regular touch points with clients, to keep adding value and reinforcing your role as their partner on their financial journey.

Gihan Perera is a futurist, conference speaker, author and consultant who gives business leaders a glimpse into what's ahead – and how they can become fit for the future. Since 1997, he has worked with business leaders, thought leaders, entrepreneurs, and other change agents – helping them with their strategy for thriving in a fast-changing world. He is the author of 'The Future of Leadership' and 10 other books.