Building a Client Service Model that Goes Beyond the Clichés

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Our Agenda Today

- Giftology
- How to use the Horsesmouth archives
- Michael Kitces...on Client Service
- Your “Personal Master Calendar“
- Debra Taylor

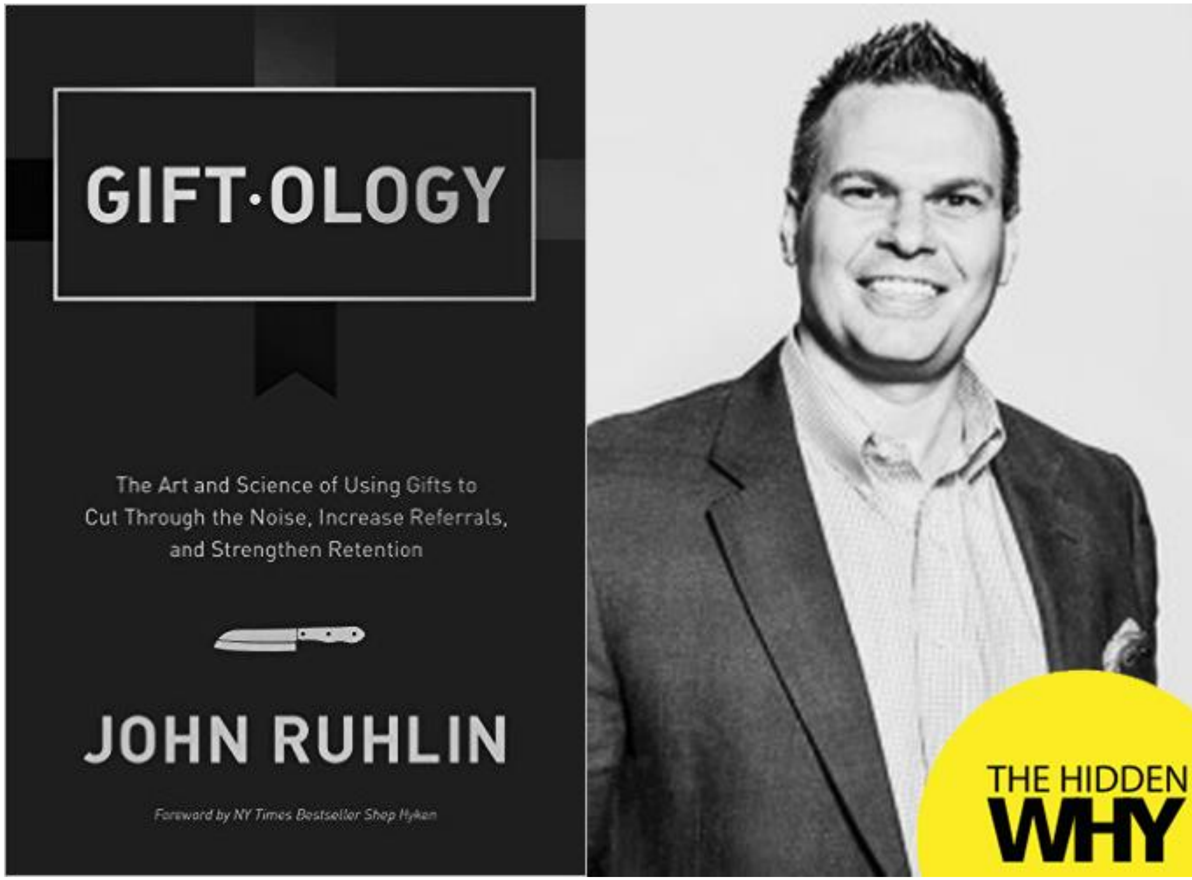
Our Bios

- **Chris Holman**
- Executive Coach, Horsesmouth
- Professional Certified Coach (PCC), ICF
- 36 years in financial services
- Coached 2000+ advisors
- cholman@Horsesmouth.com

- **Devin Kropp**
- Associate Editor, Horsesmouth
- Co-Author: “Hackproof Your Life Now!”
- Leader: HM’s Digital Marketing Program

Cliché: A Definition

- https://en.wikipedia.org/wiki/Cliché
- A **cliché** or **cliche** (/ˈkliːʃeɪ/ or /klɪˈʃeɪ/) is an expression, idea, or element of an artistic work which has become overused to the point of losing its original meaning or effect, even to the point of being trite or irritating, especially when at some earlier time it was considered meaningful or novel.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The Art and Science of Using Gifts to
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and Strengthen Retention
JOHN RUHLIN
Foreword by NY Times Bestseller Shep Hyken
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The Cubs were going through a historic remodel and wanted to give their 400 top suite owners and sponsorship executives something to say thank you that incorporated a piece of Wrigley Field. We took pieces of wood from the Cubs locker room and were able to custom make from scratch one of a kind blue tooth speakers with world class LSTN audio components inside.

The largest home builder in the US, DR Horton, was having their top 100 suppliers and over 700 people in Vegas to meet with the key decision makers for each of the 50+ DR Horton divisions. Electrolux wanted to create buzz and stand out from the other 99 competitors vying for attention. We drop shipped to 250 addresses custom ear buds two weeks before the event to the top 250 execs at DR Horton and then had beautiful walnut wood Grain Audio speakers waiting in the rooms.

The Jaguars premium seating executives wanted to engage the top 100 prospective companies and their CEOs to attend an event hosted by their CEO. The goal was to create an exclusive and intimate setting to discuss ways these companies could begin a partnership and use the Jaguars as a tool to grow their companies. The item selected was a custom engraved and packaged Cutco Santoku Chef Knife that was hand couriered to each prospect.

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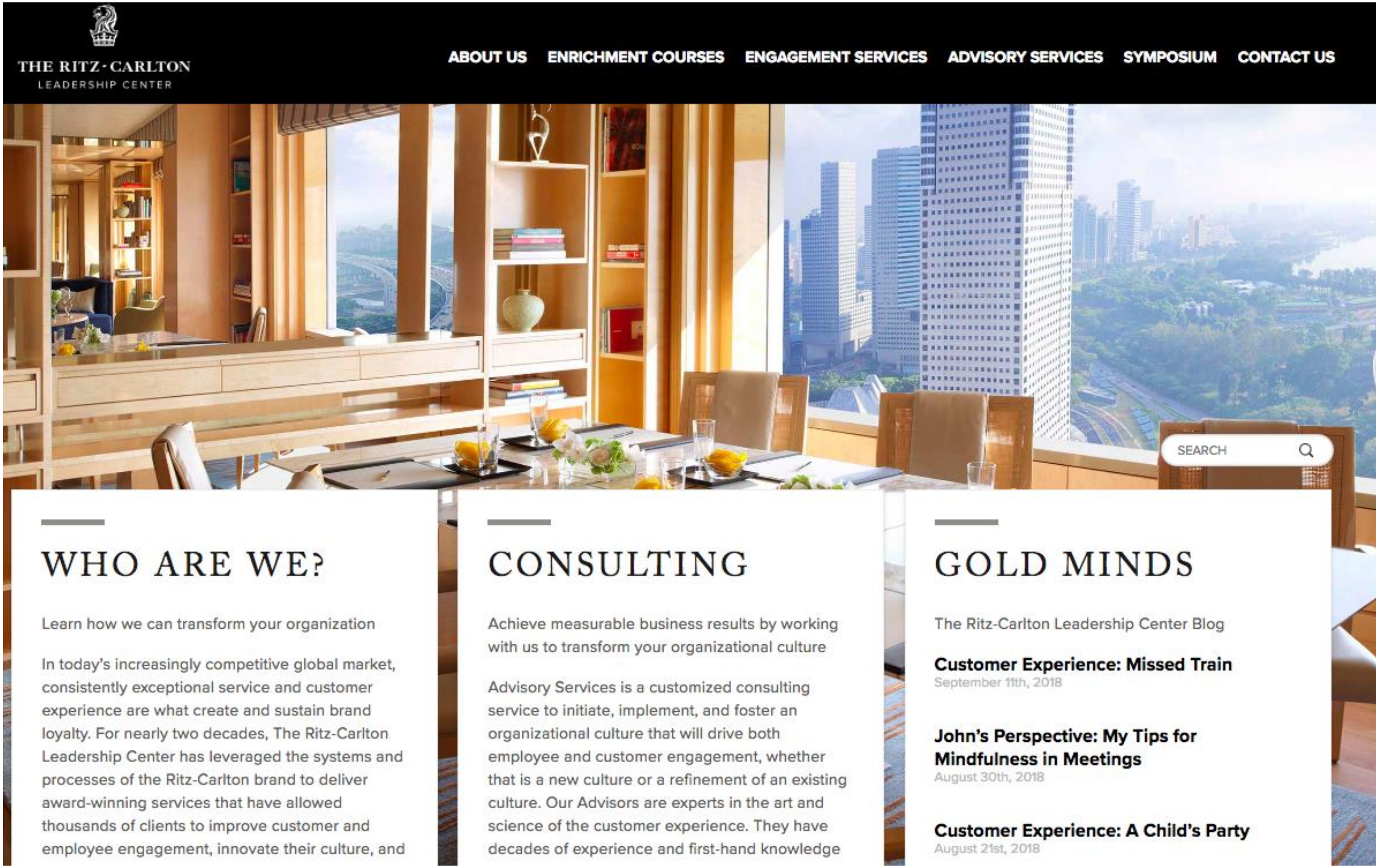
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GOLD MINDS
The Ritz-Carlton Leadership Center Blog
Customer Experience: Missed Train
September 11th, 2018
John's Perspective: My Tips for Mindfulness in Meetings
August 30th, 2018
Customer Experience: A Child's Party
August 21st, 2018

UPCOMING COURSES

DATE	COURSE	ENROLL
Nov. 5-7, 2018	Organizational Excellence Through Executive Leadership three-day course at The Ritz-Carlton, Tysons Corner in McLean, VA	Limited Availability, please call 301.547.1851 for more information
Nov. 13, 2018	Service Excellence Culture at The Ritz-Carlton, Marina Del Rey in Los Angeles, CA	Limited Availability, please call 301.547.1851 for more information
Nov. 14, 2018	Memorable Customer Service at The Ritz-Carlton, Marina Del Rey in Los Angeles, CA	Limited Availability, please call 301.547.1851 for more information
Dec. 7, 2018	Service Excellence Culture at The Ritz-Carlton, Fort Lauderdale in Fort Lauderdale, FL	Enroll Now

We hope you will join us at our upcoming courses! Experiences and destinations for 2019 are forthcoming. Schedule is subject to change.

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How Financial Advisors Can Differentiate on Great Service With a Client Service Standard

Mar 6, 2017 / Quality service is a great way to retain clients—but it's not a differentiator to attract new ones. So, how can you make your superior service standards function as an effective marketing draw?

Client Service & Retention

Our Client-Service Matrix Guides and Deepens Client Relationships

Oct 20, 2015 / *Horsesmouth Essential: What's Working Now:* This advisor segmented clients based on much more than assets, creating a service matrix that promotes better

FREE WEBINAR

Client Service: Building a Client Service Model that Goes Beyond the Clichés

Wednesday, October 24

4:00 p.m. ET/1:00 p.m. PT

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Business Planning

How Business Planning Drives Our 20%-30% Growth Year-Over-Year

Oct 17, 2018 / *What's Working Now:* Getting serious about business planning—and following processes pinned to the plan's goals—brought this advisor to the next level, even gaining him 91 clients in a single year.

Tax Planning

Top 10 Led by 'The TCJA's New Rules on Advisory Fees and 3 Tactical Responses'

Oct 1, 2018 / Last week, all eyes were on what you should advise clients to do now that the investment advisory fee deduction is no more. Check out Horsesmouth readers' other top picks

How Financial Advisors Can Differentiate on Great Service With a Client Service Standard

Mar 6, 2017 / By Michael Kitces, MSFS, MTAX, CFP, CLU, ChFC

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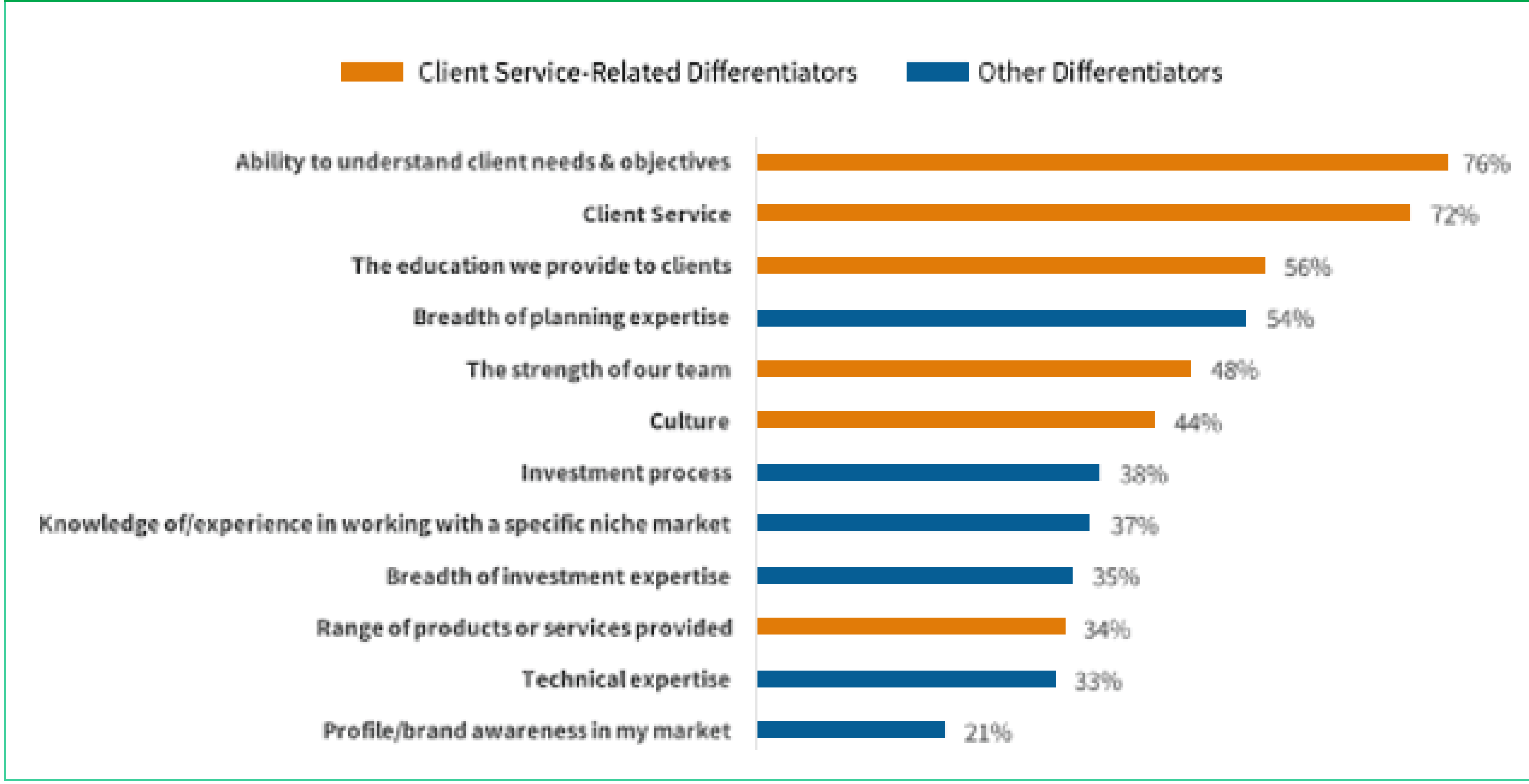
Quality service is a great way to retain clients—but it's not a differentiator to attract new ones. So, how can you make your superior service standards function as an effective marketing draw?

As part of the work for its ongoing Research and Practice Institute, the Financial Planning Association recently released a new study, entitled "Defining and Communicating Your Value." The research aimed to help understand how advisors define their value for clients, and differentiate from other advisors. And the results weren't pretty.

In fact, when asked "Which of the following sets you apart from other advisors... [and] differentiates your business from others" the surveyed advisors responded as follows:

Figure 1: What Advisors Claim as Their Differentiators



Source: Michael Kitces; FPA's Research & Practice Institute, "Defining and Communicating Your Value 2016: Trends in Practice Management Whitepaper"

Defining 'great service' by crafting clear service standards

Ultimately, the decision of who to serve and how to find a niche to specialize in is beyond the scope of today's article. But for those who do have a clearly defined ideal client—and perhaps even for those who don't—differentiating on "great service" still means, at a minimum, defining what "great service" really means, hopefully in a manner that is relevant to your target clientele.

One path to defining great service is to actually create a "Client Service Standards" document that can be used both internally with your staff/team to create proper expectations of client service (as what is "great service" to you may be higher or lower than what the rest of your team thinks is necessary!), and also to communicate service expectations directly to clients and prospects.

For instance, a Client Service Standards document might include service details like:

- How quickly do you pick up the phone? Thee rings? One ring?
- Will you always pick up calls during office hours, or allow it to roll to voicemail if no one is currently available?
- What is your timeliness in returning phone calls: Same hour? Same day? Next day?

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Client Psychology

How Your Birth Year Shapes Your Investment Experience

Oct 12, 2018 / Optimistic, pessimistic, risk-averse or risk-tolerant—they are personal qualities, but also influenced by early adulthood investing experiences. That means some generations are more eager to invest than others, a marketing and client-care variable to consider as you work with more millennials.

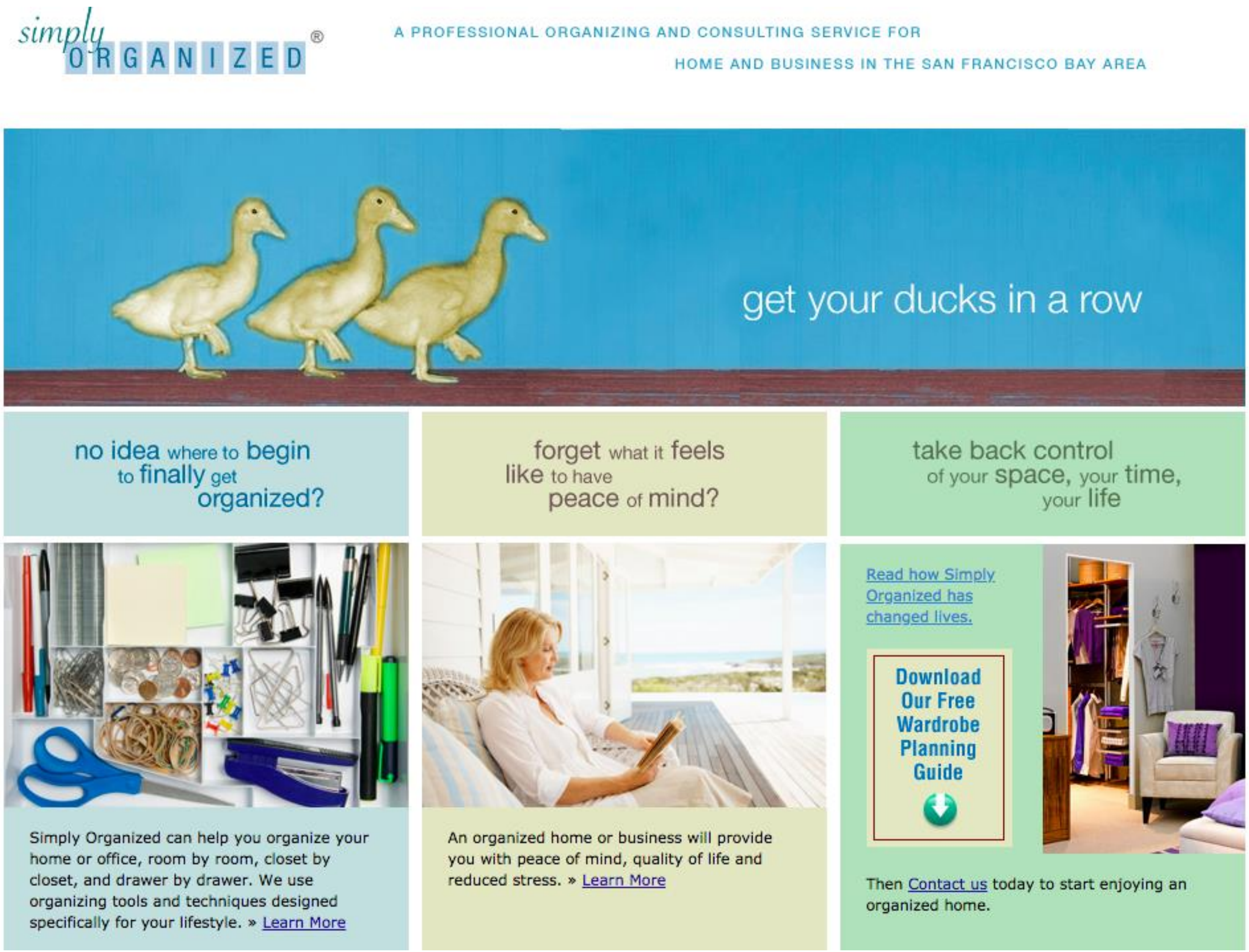
Internet & Computing

Best Tech for Solo Advisors

Aug 2, 2018 / There are so many options out there for technology these days—whether you are a one-person shop or looking to create a multi-advisor firm, what are the essential technologies that will improve your business?

Teresa Riccobuono

- Owner: Simply Organized
- Practice management consulting & recruiting specialist
- 21 years in financial advisory services
- (925) 680-7549
- teresa@simplyorganized.com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A	B	C	D	E
July	**August**	**September**	**October**	**November**
Pet medications	Pet medications	Pet medications	Pet medications	Pet medications
Blow out computer	Annual rummage sale	Book holiday travel	Blow out computer	Adjust timers for sprinklers and clean sprinkler heads
Update home inventory	Sort all prescriptions - eliminate expired, also food products	Book holiday event with neighbors	Adjust timers for lighting; check heating and air filters	Clean gutters, service water heater, descale deposits
Sort children's school projects - ask them to keep only their favorites	Evaluate technology - any upgrades needed	Schedule pet check-up	Review and update social calendar for next year	Book romantic getaway for February
		Get flu shot		

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PERSONAL MASTER CALENDAR

If older model car, check timing belt schedule	Lawn mower maintenance, remove gasoline	Sort children's clothing, swap with other parents	Turn humidifier, alternate vents from heating to air	Sharpen kitchen and hunting knives
		Clean guns	Oil change	

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Debra Azarian Taylor • 2nd

Principal / Wealth Manager at Taylor Financial Group, LLC / Financial Planner / Financial Analyst / CPA

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I am often reminded of why I love what I do every day. My desire to help people, especially with their finances and in planning their future, is a direct result of the challenges I faced in my childhood, and the struggles I witnessed my widowed mother endure as the single breadwinner ...

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Debra Taylor

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Tax Planning

The Tax Act and Business Owners: 3 Important Issues

Monday / The new tax act creates a major opportunity for business owners with the QBI deduction. But not everyone will qualify, so it's crucial to understand the complexities of the new regulation.

Market & Economic Commentary

Higher Taxes for Middle Class Is Ultimate Outcome of New Tax Law

Oct 15, 2018 / The new tax rules have been touted as benefiting the middle class, which they do in many ways. But by quietly altering the way inflation rates are measured and tax rates calculated, the new law will eventually increase taxes for everyone—permanently.

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The Value We Offer – Our Promise to You.

Financial Future Planning Chart – Discover the different services we offer to help you plan for your future.

Financial Future Planning Organizer – Take note of what's important to you.

ORGANIZING YOUR FINANCES

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Financial Future Planning Chart – Discover the different services we offer to help you plan for your future.

Financial Future Planning Organizer – Take note of what's important to you.

Confidential Client Profile Questionnaire – A questionnaire to help you get organized and help us understand your needs and goals.

Cash Flow Worksheet – Organize What Goes In and What Goes Out!

WealthMatch Fact Finder – A questionnaire to help us get started on creating your personalized financial plan.

WealthMatch Fact Finder (Supplemental Material) – A questionnaire to gather additional information that may be necessa personalized financial plan.

Client Info & Preferences Questionnaire – A questionnaire to help us get to know you better.

Marriage and Money Worksheet – A questionnaire to establish a money management plan that works for both of you.

Family Essential Records Quick-Access Guide – This Guide provides an easy way to ensure your spouse, loved ones or care important medical and financial documents, records, information and contacts.

Focused Wealth Plan – Learn how Financial Planning can be tailored to your individual objectives.

Client Bill of Rights – The Client Bill of Rights clearly identifies the level of proactive service and relationship you will expe

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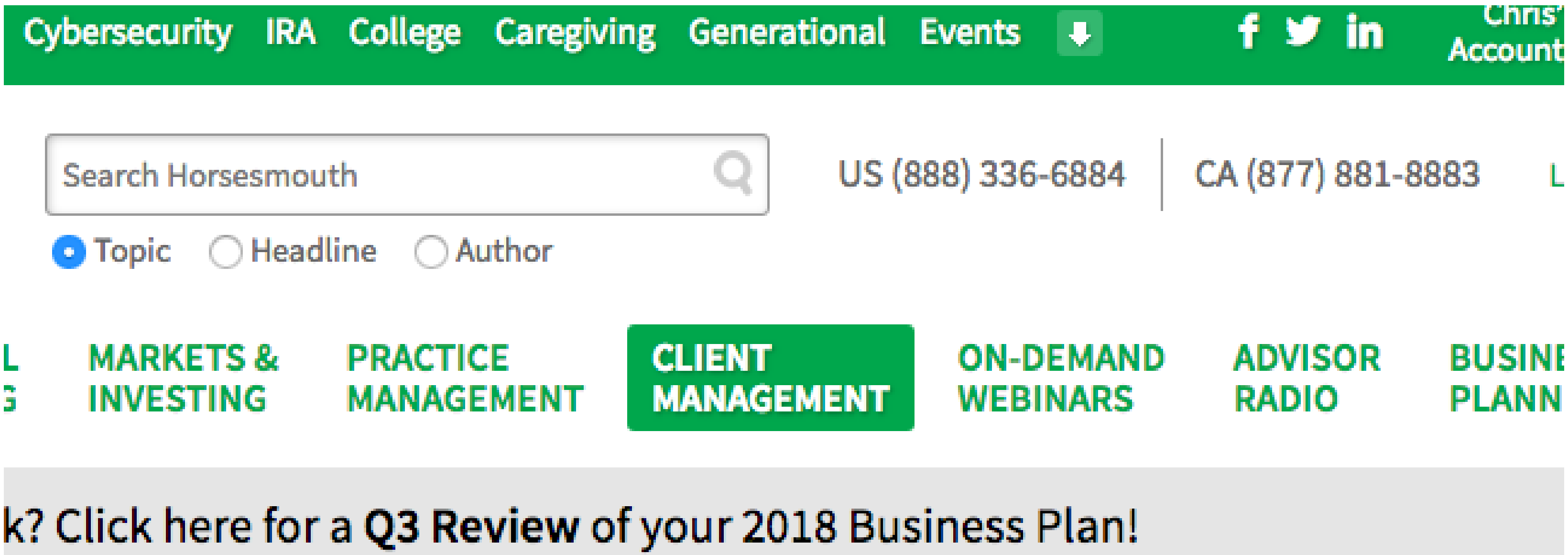
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Summary

- ”Great service” is no longer a key differentiator. It is the minimum threshold. Do you agree?

- What do your clients want? Have you asked them?

- What would your Client Service Standards document look like?

- What other takeaways from today?

My contact info:

cholman@horsesmouth.com

(212) 217-1132

https://www.linkedin.com/in/chrisholmanpcc-coach/