The new personal touch

Technology enables processes for strengthening client relationships.

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Technology. Just the word itself can conjure up feelings ranging from glee and wonder for some, to sheer terror and befuddlement for others.

Mastering technology can mean a successfully integrated business on the one hand or a constant, sometimes unwanted, connection to that business, on the other. Technology is just a tool that, if properly and appropriately applied, can make you look very good. One of the best examples is how it can enhance the "soft side" of your business processes.

Client relationship management (CRM) programs help you keep up with important dates like birthdays and anniversaries. Clients love the personal touch of a phone call or a note to wish them well. We use a Web-based application called SendOutCards, which accepts data from our CRM. Important dates are uploaded, along with mailing addresses. My assistant sets up automatic campaigns, which then sends cards automatically to reach the client's mailbox on their special day.

The system allows us to use our own photography and word phrases to create cards that are truly unique. A special feature has digitized my handwriting so the cards have that added personal touch. We use other campaigns set up to thank clients and prospects for appointments, and we always send gifts of delicious brownies for new business, and gift cards to our clients' favorite stores for birthdays — all from the same technology. I often make a follow-up call, and the reception is always friendly and appreciative.

There is nothing in the world more attractive than gratitude. Showing your graciousness adds to your credibility and may lead to greater success with relationship selling. The technology simply makes it easier and more efficient to do so.

Another example of using technology to enhance the soft side of business relationships is the interactive nature of today's financial planning software. It can improve the client experience and make you a more effective and inclusive advisor. Today's Web-based applications allow clients to see the plan through their own Web browser with log-in security.

We use technology to thank clients with brownies.

We also use an online data-gathering program called PreciseFP, which emails the client or prospect a secured link to a fact-finding template. When the client completes the form and closes the link, it sends a secure email to my assistant, who uploads the data to our CRM. Since our CRM is linked to our financial planning software, this process makes it easier to update proposals and reviews. Involving clients and prospects in this process creates an atmosphere of teamwork, adding to their experience and bonding them more closely to us.

In the end, all of those gigabytes and terabytes with their processor and link speed cousins can really be a highway to closer client relationships, positioning you as the advisor of choice in your community. RT

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