The “Daily Plan-It™”

ESTATE & BUSINESS LAW GROUP, P.C.

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Enhancing the Client Experience

In a country that proudly boasts, “the customer is always right,” client service isn’t very good. How were you treated the last time you went to see your doctor? Did the receptionist greet you warmly and with respect? Was the doctor prepared to see you or did you wait long? How did you feel about it?

If your experience was like most people’s, you probably didn’t feel good about it. The receptionist may have called you by your first name (even though you had never met him before). But was it sincere, or was he primarily interested in collecting your insurance deductible? Did the doctor listen to what you had to say and leave you with a warm and fuzzy feeling? Probably not (especially if it was a urologist)!

For financial professionals, providing a warm, positive client experience is as essential to closing the sale as it is to continuing relationships with your clients. Studies find that people make their decisions about whether or not to work with someone within the first 30 seconds of their initial contact with you. Can *you* get out of your office to greet a prospect within half a minute? Most of us can’t and don’t. Therefore, we have to have office procedures to make the client’s initial contact positive enough for her to want to talk to us.

Taking the lead

This involves incredibly simple things; but like too many simple things, they’re often overlooked. Make sure that your office is easy to find. It may make sense to send a map and directions to a client before he shows up, along with an appointment confirmation letter. Make sure your receptionist welcomes the clients warmly when they arrive, and offers them coffee, water or other libations. Is your reception area comfortable? Does it smell good? All of these things make an impression on a new prospect, and you’d like to make that a positive one.

Very few people like waiting. And they probably don’t like waiting for you in your conference room. If clients have an appointment at 2:15, be prepared to see them at 2:00, just in case they arrive early.

Finally, how do prospects feel when they leave your office? Were they treated fairly and listened to? Was their time with you a valuable use of their time? Did you validate their parking? Don’t give them something to complain about.

Easier said than done

All of this sounds easy and logical, but most of us don’t meet these basic standards. We neglect to teach our team members that they are salespeople for our businesses as much as we are. Everything they do affects the client’s experience. Put together procedures for welcoming clients and getting them settled in your conference room. Make sure that clients can get to your office without too much trouble. Have a script to welcome people warmly over the telephone and at the front door. Then, rehearse your staff to make sure that they have memorized it. Create procedures for setting up the conference room so that it’s always clean and coffee is always ready. In other words, train your team to treat your clients the way *you* want to be treated!

Workshop Schedule

The Truth About Estate Planning
Fundamentals of Proper Planning

Cost: no charge
Time: 7:00 to 9:00 p.m.
Dates: 9/29/06 Tuesday (LHS)
10/10/06 Tuesday
11/7/06 Tuesday

Registration: Contact Mary Lang at (847) 367-4460

For online information about Estate Planning, please encourage your clients to visit us at http://eblawgroup.com

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