

Article of Interest Inventory

Utilizing an inventory of articles will make implementation of this process easy and effective. Use these ideas to begin creating your *Article of Interest* Inventory.

First, consider the common interests that your top clients share. Choose and subscribe to magazines related to those like interests.

1. Use the magazines as an *Article of Interest* resource.
2. Place a current issue in the office lobby for your clients to enjoy when they arrive.

Maintain a Catalogue of Websites and Use Google Alerts

1. Create a folder called AOI (Article of Interest) in the Favorites/Bookmarks section of your web browser.
2. When the *Article of Interest* reminders occur in your contact manager, look up the Client Profile information and do an internet search on an area of client interest.
 - a. For example, **golf**.
3. Alternately, you can also set specific Google alerts on topics of your choice.
4. Create a subfolder for the area of interest in the AOI folder.
 - a. For example, name the subfolder "Golf Articles."
5. Review the top ten search results and save the best four links in the folder you created.

Create a Catalogue of Service Items and Client-Friendly Apps.

1. Bookmark the website of a reputable service company.
 - a. For example, a local moving company.
2. Look for downloadable checklists or user-friendly apps which are intended for sharing.
 - a. For example, find "Moving Checklists" or "Your Moving App"
3. Send the checklist or reference to the app to your client when appropriate.

This client-specific approach also works with respect to upcoming vacations. Travel websites often have articles and apps to assist with trip planning.

How to Deliver an Article of Interest

When it is time to send an Article of Interest, do the following steps:

1. Select and print an article.
2. Write a short, personalized note to attach to the article.

For example, "[Client name], thought you might find this of interest.
Best regards, [Advisor first name]."
3. Mail your note and article in a distinctively colored envelope, handwrite the addressee, and use a postage stamp for mailing. Your client will learn to anticipate the contents, as you send articles over time.

