

Responding to Moments of Truth – True Stories

Making client phone calls are an inexpensive and powerful client service strategy. By calling clients, you convey to them your proactive approach and demonstrate your sincere interest. If you keep meticulous notes of these conversations, you can build huge dossiers which remind you what matters in your clients' lives (FORM). These dossiers will never leave you stranded for things to talk about. In fact, when you are talking about things that are truly important and interesting to your clients, you enhance your level of trust and rapport with them. These are exactly the kinds of qualities that help evolve clients to become Ideal Clients.

Client Information Must Be Chronicled to make it an Asset

Far too many professionals rely on their memories to store these client details. Although this is quite functional for some, the information you learn about your clients is not really an asset until the details are documented. And make no mistake, this information is proprietary. By documenting the information in an easily accessible database, nothing slips through the cracks. You can invest every conversation into the next, and it ensures that the entire team has access to up-to-date details that allow them to provide consistent and personalized service.

Recognizing and Responding to Moments of Truth

Gathering personal information is important, however, it is equally important to note misfortunes or milestones that are occurring in your clients' lives. Becoming exceptional at the art of demonstrating to your clients that "yes, you are paying attention", can be extremely powerful in the development of your relationship. By identifying and responding to "moments of truth" is one way to show that you are paying attention. Moments of truth are those times when people are experiencing significant changes, challenges or celebrations – anything that is important in your clients' lives.

Here is one real-life example to demonstrate the value of recognizing these moments of truth.

A Financial Planner had a gentleman client who was a golf fanatic. Sadly, the client became ill and for the last four months of his life, he was confined to the house. He became incredibly frustrated at this change in his lifestyle.

Take a minute and think how you would respond to this situation. Would you have the necessary information about this client to respond in a precise and meaningful way? Is the information documented so that in the event of your absence, your staff could respond to these situations? This client's Financial Planner had detailed information about him and offered honest, caring support during this difficult period.

When the Financial Planner learned that their golf-loving client was housebound, he purchased a handheld golf game and had it sent by courier to his client's house. The client was so tickled by their thoughtfulness that he remarked to his wife: "It made my day". After the client passed away, his wife made a point of telling the Financial Planner that he adored that golf game, and played it incessantly; the game proved to be the perfect distraction. The wife also made sure that the Financial Planner knew her husband had told her to put her complete trust in them, because he was sure she would be well looked after.

Another financial professional, had recently acquired a new client who was getting ready for a six-week trip to New Zealand. The financial professional's coach asked him what he was doing about that; there was a long uncomfortable silence on the end of the line. The coach enthusiastically jumped in and advised him to seize this opportunity to do the unexpected and "wow" his new client. It was specifically recommended he send his new client a nice "Bon Voyage" card along with a travel book on New Zealand.

The following week, the financial professional could not wait to tell his coach about what had happened -he had couriered the book and card to the client. Almost immediately he received a call from his new client thanking him for the thoughtful gesture and telling him how he looked forward to reading the book. All the while, the financial professional could hear the wife of the client in the background – talking excitedly about the book and their fabulous upcoming trip. So, will the book get read? You bet. Just think about the amount of time you spend in the airport and on the airplane – especially on a trip to New Zealand. It wouldn't be surprising if they read it cover to cover – both he and his wife.

The moral here is this:

It's easy to get fooled into thinking this isn't the important stuff; when in fact it is.

Taking it to the Next Level

You are already well-practiced in the process of making regular calls to your clients. You are also familiar with the process of capturing personal (FORM) information you learn during these discussions and documenting it where you and others on your team can have access to it. By all accounts, that is two significant steps in the right direction.

Now, to take these calls to the next level and deliver maximum client impact, you need to actively look for opportunities to overwhelm your best clients. You can begin by becoming familiar with the various types of Moments of Truth. This will provide you with a list of important life events you can keep on your radar when speaking with clients.

Loyalty Flows from Service

Once it is understood that loyalty flows from service, you have a chance to understand something even more valuable. The way to generate unexpected service to your best clients is to ask yourself (and them for that matter), what do they expect? Once you're clear on what your clients expect, you can then meet those expectations consistently.

After that, you can move on to the fun part and ask "What can I do now that my clients won't expect?" As I'm sure you've experienced, it's always the unexpected service that gets talked about, and it's always 'getting talked about' that increases your professional value.