

6 TIPS FOR MAKING A QUICK \$100,000

SPECIAL REPORT

vision
financial marketing



1 You must have a **great brand to be trusted.**

Branding is essential. It's as simple as that. In fact, perhaps one of the most important aspects of building a successful business today is to begin by building a successful, recognizable brand that speaks to your client base. More than ever before, your brand will have significant impact on whether or not a client will even decide to come into your office for a first meeting. So, how do you build a brand that your clients can relate to and that offers the credibility that they're seeking?



To truly deliver the value that is expected nowadays, start with your logo design. In any good brand, the logo will be recognized instantly. There are design firms all across the nation that can assist in creating a new logo for your business or refreshing your current logo. As a side note, it's important to also refresh your brand every few years as the design styles and trends are everchanging.

Next, you'll need to ensure that your website is up-to-date. If you don't have a website – you must. And if it's been a few years since you first built yours – it's time for an update. Any client will Google you before they even meet with you and won't hesitate to look elsewhere if your website isn't up to par.

2 Mail and email your clients regularly to **keep-in-touch**

Mailing and emailing clients is one of the easiest things we can do to help our business, yet many of us aren't very good at regularly keeping-in-touch. We often forget, get too busy, don't think it's worth spending the money or just aren't sure what to send and when to send it.

To really take your business communications to the next level, start by setting up a keep-in-touch campaign for the entire year. This will offer you the guidance you need to stay on track and accountable throughout the year. You can also setup specific content messaging that you'd like to send out throughout the year to keep your clients engaged.

3 Send clients a **questionnaire survey**



Surveys are more popular now than ever before. Sending your clients a quick 5-minute survey is a terrific (and inexpensive) way to increase client engagement. There are so many online survey providers nowadays that truly make it easier than ever to create. And, the best part is that the surveys don't need to be long at all, they could be just a few questions and still as effective. Plus, any changes that you do make based off client feedback could make a big impact in their eyes.

Additionally, surveys are ultra-important for feedback on your overall business. Topics including client service, items of interest, and so much more. They give you the potential to get to know your clients even better – which will only help your business. Surveys also help you to formulate specific strategies to improve your business.

4 Improve your **client service**

One of the most overlooked aspects of a professional's business is enhanced client service. Many business owner's think that you need to have a fancy office or a staff of 10 to really offer elite service to your clients. But, that couldn't be farther from the truth. Whether you have an entire staff, or are just a one-man shop, providing great client service is something everyone can strive for – and achieve.

If you can, hire a part-time receptionist who can warmly greet your clients. It's a small price to pay for a big impression. You can also easily spruce up the "waiting area" in your office to make it more inviting. Offering a cozy sitting area, beverages, and reading options are just a few ways to enhance the client experience in your office.



5 Identify specific opportunities

As a financial professional, you work hard to make a sale with a new client. But, what happens after that? Many people simply move on. Identifying opportunities within your existing client database can lead to thousands and thousands in additional revenue every year. And the best part, you don't have to shell out anymore marketing dollars.

Being thorough in your client meetings to identify these specific opportunities and tracking them within your CRM will give you all the tools you need to easily identify these opportunities and act on them at the right moment.



6 Personally reach out and connect with your clients regularly

Relationships are built off communication. Yet, there are so many business professionals out there who don't even attempt to connect with their clients on a regular basis. If they're not talking to you, chances are they're talking to someone else.

At the end of the day, your client isn't going to remain your client because they think you're the most knowledgeable. They appreciate people who care, and people who genuinely take interest. A personal phone call or short email can go a long way in the eyes of your client. Take a few minutes at the end of every day to reach out to a few of your clients to go that extra mile.