# Extraordinary Service for Extraordinary Times

By Steve Sanduski, CFP®

Think back to a time when you experienced an extraordinary and unexpected level of kindness and service. It may have happened in the most unexpected situations. For me, it happened at the local grocery store. I purchased several bags of groceries and when I got home, I realized that I was missing a 12-pack of root beer soda. So, I called the store and explained that somehow between the checkout line and my car, the 12-pack of soda disappeared.

After explaining the situation, the store employee said, “Would it be okay if I stopped by your house and delivered the soda to you?” I said that would be great. Then, he asked, “If I delivered it in the next 30 minutes, would that be quick enough?” I said that would be terrific. About 25 minutes later, there was a knock on my door and the store employee proudly gave me a 12-pack of root beer. Then, he looked at me and said, “For all your trouble, here’s a gallon of vanilla ice cream so you can make some root beer floats.” I was stunned. I was not accustomed to this level of service, especially from a young clerk at a grocery store.

As a result of this extraordinary and unexpected level of kindness and service, I’ve become an evangelist for this particular grocery store. I shop there and I’ve shared this story with many of my friends. I’m sure they’ve received a thousand-fold return on that gallon of vanilla ice cream.

This level of client service is what we call Love-Affair Marketing™. Love-Affair Marketing is a way of doing business that was developed by 19-time #1 Producer, Ron Carson, CFP®, CFS, ChFC, and it means doing things so extraordinary, so unexpected, and so genuine, that your clients will become your evangelists and will send you referrals of people just like themselves. The best way to grow your practice is through referrals and the best way to set the stage for referrals is to provide an extraordinary level of client service.

In today’s society, poor service is all around us. But, each time you receive poor service, pat your wallet or purse and smile. Why? Because these other service providers are lowering your clients’ expectation level. When you step in and deliver Love-Affair Marketing, your clients will be positively delighted and reciprocate by sending you referrals.

As a financial advisor, how do you deliver Love-Affair Marketing? The first thing you need to do is profile your clients (visit the Free Tools page on the PEAK website to download a template). To profile your clients, review your client list and identify your “A+”, “A”, “B”, “C”, and “D” clients. For purposes of referrals, just focus on your “A+” and “A” clients. These are the types of clients you want to clone. Here’s a brief description of the two:

**“A+” CLIENTS**

> These are your very best clients. You may currently have one or two. These clients are “A+” not because they have a lot of money invested with you (they do!), but because of the quality of referrals they can provide. These clients come from all walks of life and they have many gatekeepers. You may get 100 “A”, “B”, “C”, or “D” clients through marketing before you get an “A+” client. The key to getting an “A+” client is through referrals.

**“A” CLIENTS**

These clients are successful professionals, affluent retirees, and small business owners. Their net worth is generally in the seven figures and their incomes are generally in the six figures.

Once you have identified your “A+” and “A” clients, start treating them with love that expresses itself in genuine appreciation, care, support, respect, and a desire to help and serve. Here are a few simple ways you can express this:

1. **Birthday call.** You will be amazed at the power of calling your clients on their birthday. It is a very simple act yet it is genuinely appreciated by the receiver and will separate you from most other advisors.

2. **Greeting card.** When you send your client a Holiday card or greeting card, make it a special one. By this I mean, don’t send a card that comes from a box of cards that all look the same. Send a personalized card that will have meaning to the person you are sending it to. Add a personalized note to make it really special.

3. **Spouse birthday flowers.** For your female clients and for your male clients’ spouse, send them flowers on their birthday. Flowers will brighten their day and their opinion of you and your firm.

4. **Wedding anniversary.** For your male clients, call them one week ahead of their wedding anniversary and remind them that it’s coming up. Unfortunately, some men tend to let this date slip and by reminding them, you may save them from being in the dog house.

5. **Random acts of kindness.** For no reason other than your genuine appreciation for your client, do something special for them. Be sincere and you’ll put a smile on their face that will light up their life.

6. **Retirement party.** If you have a client who is retiring, throw them a surprise retirement party. Imagine the look on their face when they see you are the one behind it!

7. **Special luncheon.** Invite your “A+” clients to a special luncheon. And, while you do, ask them to invite a friend.

8. **Handwritten notes.** In the age of e-mail, the lost art of the handwritten note is more appreciated than ever. Get in the habit of sending your clients handwritten notes and thank you letters and they will be the ones thanking you.

Of course, you may think of other ideas, too, but this list should give you a good start. As you do these things, keep in mind why you are doing them. Your motivation should be pure, genuine, and sincere and, if it’s not, then don’t do it. While client loyalty and referrals are not your objectives (remember this is done out of kindness and love), that will be the result.

You may say that these “special things” have nothing to do with putting together quality plans for clients that meet their goals and objectives. That’s true, but your job is more than just numbers. Love-Affair Marketing assumes that you are already delivering high quality planning advice. Think of Love-Affair Marketing as an added dimension you bring to your client relationships that distinguishes you from all other advisors. These "special things" will cement your client relationships and remind your clients that you don't view them as simply the source of your income, but rather as someone whom you can serve and delight.

In order to deliver Love-Affair Marketing, you have to approach it in a systematic way. For starters, you have to get to know your clients. One of the best ways to do this is to ask them to complete a short personal profile. This personal profile asks such questions as:

- What is one of their proudest accomplishments?
- What are a couple of their future goals?
- Who is their favorite author?
- What is their favorite wine?
- What is their spouse's birthday?
- What is their wedding anniversary?
- What is their favorite vacation spot?
- What are their hobbies?

This profile should be part of your new client welcome kit. The data should be entered into a contact management system that allows you to easily retrieve it.

For example, once the data is entered, you should have a system whereby one of your team members runs a weekly report of all your clients who have a birthday that week. From the report, have your team member write your clients' birthdays on a weekly calendar that gets handed out to all your team members. You should make the calls to your "A+" and "A" clients while another team member can make the calls to your "B" and "C" clients. If you have a mobile phone, program it with your "A+" and "A" clients' phone numbers and then call them on their birthday as you make your way home from the office. You will be surprised to find that some of your client's grandchildren do not even call them on their birthday, so when your call comes in, it will be genuinely appreciated. You can do the same thing for your clients' wedding anniversaries.

As a random act of kindness, use the client's personal profile to generate some ideas on a small gift or gesture that might brighten their day. It doesn't have to be anything big – it's the thought that counts. Also, empower your staff to take the initiative and perform random acts of kindness. For example, if your staff member notices that one of your client's parents just passed away, give your staff member the authority to send flowers and a thoughtful card.

Keep in mind that the key to generating a consistently extraordinary level of client service is to have quality, caring team members and to have a system.  The system will make sure no opportunity to delight your clients is squandered.

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