Tips to personalize and humanize your client interactions

Habits of highly effective financial professionals

Keep it simple. Keep them engaged.

A straightforward approach will help inspire trust and may lead to stronger client relationships. This flier offers practical examples of how to bring more personalized interaction to your conversations as you strive to help clients reach their retirement income goals.

Clients want a financial professional who demonstrates

- A desire to know them and understand their dreams as well as concerns.
- Consistent, proactive communication, short-term and long-term.
- A willingness to always listen and help make well-thought-out decisions.
- An attitude of counsel, service and empathy.

Tips for personalizing every communication

1. Take time during every conversation to establish rapport. Create an atmosphere of trust to put clients at ease.
2. Begin the business portion with this question: “What are three things you would like to discuss today?”
3. Demonstrate your interest by actively listening and being engaged and sincere with your comments and reactions.
4. Have an assortment of greeting cards, note cards and small giveaways to use, as appropriate, to show you’re thinking of them.

> **Best practice:** Sign your correspondence with “Warm regards” or “Kind regards.” Clients recognize that as relational versus the more institutional “Sincerely yours.”

5. When onboarding a new client or updating their files, find out what’s important to them. Set up a process to send personalized notes on special days, such as:
   - Family member birthdays or accomplishments (e.g., graduation, marriage, or new home purchase)
   - Business start dates and anniversaries, including when they first became your client

6. Set up an alert on your web browser to inform you of news related to their business, profession and interests.

Question to ask: "What charitable activities are you currently involved in, if you don't mind my asking?"

7. Evaluate your clients' activities and events to ensure you're creating new personalized and humanized experiences for them.
8. Be proactive, not reactive with your communications, especially when they involve important events and topics.
9. Avoid calling just to "touch base" or "check in." Call to discuss specific topics such as:
   - Progress you've made toward helping them achieve a goal
   - Issues you know they care about
   - New ideas and services you have that may benefit them
   - Topics they need to know about—changes to tax laws, new regulations, coverage adjustments, etc.
10. Close every meeting by demonstrating that their input is significant: "What are three things I can do to strengthen our relationship?"

Personalized and humanized interactions can keep your client relationships strong and thriving. Using the tips and tools in this flier will ensure you stay on track.

Content created in partnership with Richard Weylman and The Weylman Center for Excellence in Practice Management.™

Not a deposit	
Not FDIC-insured	
Not insured by any federal government agency	
Not guaranteed by any bank or savings association	
May go down in value	

LincolnFinancial.com

Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates.

Affiliates are separately responsible for their own financial and contractual obligations.

LCN-3111061-060220
POD 6/20 **Z02**
Order code: LFD-PMGMT-FLI016

Lincoln Financial Group®

Lincoln has a wealth of educational tools to help you grow and be more effective. Contact your Lincoln representative for more information.

Lincoln Financial Group® affiliates, their distributors, and their respective employees, representatives and/or insurance agents do not provide tax, accounting or legal advice. Please consult an independent advisor as to any tax, accounting or legal statements made herein.

Affiliates include broker-dealer/distributor Lincoln Financial Distributors, Inc., Radnor, PA, and insurance company affiliates The Lincoln National Life Insurance Company, Fort Wayne, IN, and Lincoln Life & Annuity Company of New York, Syracuse, NY.