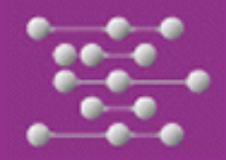


RETENTION OF CLIENTS

A presentation by
Henry Charles

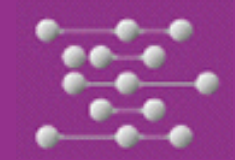
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Retention of clients



INTRODUCTION

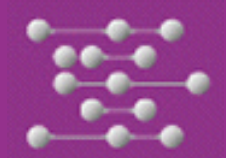
Retention of clients



Questionnaire

- Why are we losing clients?
- Why are we retaining clients?
- How do we know what clients think of us?
- What are we currently doing to actively retain clients?
- What more can we do in the future to retain clients?

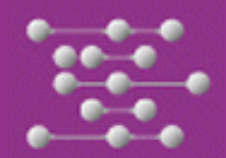
Retention of clients



What are clients seeking from their professional advisors?

- Help with their business
 - a) speaking the clients language
 - b) learning more about the client's business and their key issues
 - c) conducting regular meetings with clients to focus on strategic matters
- Take control
- Protect and advise

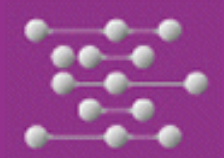
Retention of clients



What are clients seeking from their professional advisors *(continued)*

- Provide a better experience
 - a) they do not give timely advice and phone calls are not returned
 - b) they find things are left until the last minute
 - c) they are not sure who deals with their work and who to talk to
 - d) they hear from the advisor very rarely
 - e) they are charged for very short phone calls
 - f) they do not like surprises – taxes, bills, advisors out of town

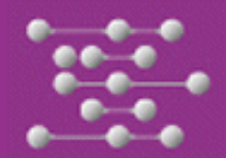
Retention of clients



What are clients seeking from their professional advisors *(continued)*

- Educate
 - a) conducting seminars
 - b) sending clients interesting articles either within a newsletter or extract of industry magazine
 - c) introducing clients to one another and letting them network
 - d) letting clients know what services you offer and how they may be relevant
 - e) sitting with clients and talking to them, individually and face to face. Simply putting information on a website for example is not sufficient
 - f) becoming proficient at asking questions to find out what your clients need and what they want

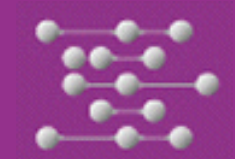
Retention of clients



Client care

- Market to your existing clients
- Be consistent in your approach and interactions
- Follow through on your commitments
- Connect with your clients
- Have fun
- Position yourself as a resource for life
- Ask for feedback and input
- Share resources
- Reward clients for loyalty
- Keep learning

Retention of clients



Questionnaire

Why are we losing clients?

Why are we retaining clients?

How do we know what clients think of us?

What are we currently doing to actively retain clients?

What more can we do in the future to retain clients?

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