



A Call That Will Blow Clients Away

By Dan Richards

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In today's hyper-competitive, commoditized world, everyone needs a point of difference.

In the absence of unique products or a cost advantage, many businesses point to a commitment to “service” as their competitive advantage ... although in truth many more companies talk about exceptional service than actually deliver it.

That's why I was struck by a financial advisor's story about a shopping excursion for hiking boots, with a key message about delivering service that truly stands out.



Preparing for a hike up Kilimanjaro

For the past three years, I've co-chaired a Toronto fundraising dinner for Amani Children's Home at the base of Mount Kilimanjaro. As an extension of that, in July I'm helping organize a fundraising climb up Kilimanjaro involving members of the financial industry.

One of those climbing is Murray Morton, a 37-year industry veteran in Toronto. Given the importance of the right hiking boots, on a Saturday in January he went to Bass Pro Shop, a sporting goods superstore north of the city.

Murray talked to a salesperson named Chris about his need for hiking boots for the trek up Kilimanjaro. The tour company he's going with is Tusker Tours, which takes a few extra days to help climbers acclimatize to high altitudes and has a 95% success rate of getting to the top.

“I haven't climbed Kilimanjaro but I have hiked in Kenya,” Chris said. He then explained that Murray needed waterproof boots for the low-lying wetter terrain as well as boots providing warmth for early and late in the day at high altitudes, all without being too heavy.

Chris pulled out several pairs, recommended one in particular, asked Murray to wear them for 15 or 20 minutes to ensure they were comfortable, and asked to meet with him afterwards.



After his trial period, Murray was happy with the recommendation, but when he went to leave he found that Chris was on break, so he paid for his purchase and went on his way.

So far: a satisfactory experience, with attentive service from someone knowledgeable and interested – but nothing especially extraordinary.

Going the extra mile

The following Monday, Murray called Tusker's offices in Nevada to discuss a couple of details of the trip ... and mentioned that he'd bought his hiking boots on the weekend.

"Hold on a second," he was told. *"I think we may have a message for you."*

Sure enough, when Tusker's staff came into the office Monday morning, they'd found a voice mail from Chris at Bass Pro Shop. He hadn't got Murray's name but had remembered the tour company ... and after going online to find its phone number, left a message apologizing for not being there when he left, but leaving his name and phone number should Murray have any questions on the boots or anything else he needed help with for his climb.

"I was absolutely blown away," Murray said. *"In fact, I sent the manager of the store an email about this experience ... and you know that I'm going back for the rest of the stuff I need for my climb, even if it is a bit of an extra drive."*

Emphasizing the human element

Most of us would have had the same reaction as Murray. What made this experience stand out, quite simply, was the human element ... someone taking the time to go way above and beyond what could be reasonably expected.

I remember an interaction I had in the early 1980s, before the advent of centralized call centers. At lunch on the day that I was scheduled to fly to London, I discovered my wallet missing, along with all my credit cards. On calling the local American Express office, I spoke to "Stephen" in customer service. When I emphasized that I was leaving that evening, he assured me that they'd courier a replacement card to me by the end of the day. That didn't blow me away ... but what did astonish me was getting a call from reception at 4:30 that I needed to sign for an Amex card and discovering that Stephen had delivered it in person.

When I expressed my surprise, he said: *"Normally we do send cards by courier but occasionally things go wrong. Given your situation and that your office is on my way home, I asked my manager if I could drop the card off and get you to sign for it myself."*



Building personal connections into your process

In both of these cases, what made an ordinary service interaction extraordinary was the personal dimension. As consumers, we've all become accustomed to companies' focus on efficiency at all costs, no matter how much we've inconvenienced; think no further than the ubiquitous *automated voice attendants* with multiple levels of screens we have to fight through to speak to someone to get our questions answered or problems resolved.

Today's increasingly depersonalized "do more with less" world creates an opportunity to stand out for those advisors who personally acknowledge key clients, both reactively and proactively.

Those opportunities emerge in the course of your regular week, as clients call with problems or issues.

You have to create a culture where everyone on your team sees any issues that key clients run into as opportunities to astonish them and deepen relationships, just as Murray was astonished by Chris at Bass Pro Shop and I was blown away by Stephen at AMEX. Large call centers are intensely focused on metrics like "time-per-call" and penalize employees who take too long with a customer on the phone.

You need to do the exact opposite ... encourage your staff to spend extra time with key clients and to recognize and reward them when they do. One top-producing advisor focuses on these small touches and "above and beyond" efforts.

He circulates any thank you emails from clients to his team and whenever clients mention something that has especially impressed them on the phone, he asks the client to send him a quick email so he can send that around also. Then, every three months he and his staff have a lunch to review all the client emails and to vote on the "client delight experience of the quarter."

The proactive opportunities are ones that you initiate. As part of your weekly planning meeting, take five minutes to focus on one important client and brainstorm around what you could do to provide a level of personal attention and acknowledgement that would surpass anything they could reasonably expect.

Here's a final example of unexpected personal attention at work.

An advisor told me about his client – a multi-million dollar business owner - who, after years of prodding by his wife, took a two-week holiday to go on a cruise. When they checked into their cabin, they found a congratulatory note of best wishes from their advisor with flowers; at dinner the first night, the advisor had arranged for a bottle of champagne.



On his first day back in the office, the client called the advisor and said, *"I was planning to phone to thank you at some point this week, but my wife made me promise that I'd call you first thing this morning."* The response had nothing to do with the cost of the flowers and champagne; it had everything to do with the little bit of extra effort it took to make this gesture stand out.

None of this is particularly efficient or scalable, which means that you can only afford to target key clients with this approach ... but it's precisely the lack of efficiency and scalability that makes these kinds of communication effective. In an impersonal world, one of the ways you can differentiate yourself is by providing your best clients with a level of personal attention far above what they expect.

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