

Getting in Front of Your Top Clients this Holiday Season

By Dan Richards
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The single best use of your time is regular reviews with your top clients. But periodic informal conversations with clients over coffee or lunch are an equally powerful way to build deep bonds. With the holidays approaching, this is a great time to arrange those meetings.

These conversations will make the transition from a purely business relationship to a friendship. There's one big problem with making these unstructured conversations happen, however – and that's time.



Fighting the clock

Talk to most people about the challenges they face and inevitably you'll hear the T word – "time."

Even very successful people are swamped. There are a number of reasons for this – the escalating proliferation of online information we need to stay on top of, the growing flood of email communication and a "do more with less" mindset among many companies. Those factors have created a toxic brew in which many clients struggle to find time for a relaxing coffee just to get caught up.

This is why even people who'd like to sit down with you have difficulty making that happen. You have to be sensitive to that reality in the requests for their time we make of clients

All that said, there are two weeks each year when your chances of sitting down with clients are better than any others –the weeks leading up to Christmas. During the week starting Monday December 10 and especially beginning Monday December 17, most people are still around, but things are winding down. If you're ever going to have the chance to get in front of a top client for a casual lunch or coffee, these two weeks are when it will happen.

Taking the initiative

If this idea appeals to you, here are two simple steps:



Write down the names of five to ten relationships with whom you'd like to meet more than any others; these will typically be top clients or referral sources.

Once you've done that, pick up the phone and call them. Chances are you'll get voice mail – in that case, your message might be something like: *"Bob, it's Dan Richards. I was hoping we might be able to grab a quick sandwich or cup of coffee to get caught up during the week of December 10 or 17. I'll send you an email with some dates – look forward to chatting."*

Your follow-up email should mirror your message.

Keep it short and to the point. The subject line might say "lunch" and the text something like:

Further to my vmail, I'd love to get caught up. Let me know if you have time for a quick sandwich or cup of coffee during the week of December 10 or 17. Right now I could do lunch on December 11, 14, 15, 18 and 20 – let me know if one of those work for you. And if not, perhaps you can suggest a couple of times for a coffee, I'd be happy to pop by the Starbucks in your lobby"

This approach makes one critical assumption –that the people you want to sit down with also want to sit down with you, and that the only thing preventing this is time (and perhaps a failure on your part to suggest this in the past).

If that's the case, act now – not next week, not tomorrow – now. Take 10 minutes to write down those five names, make those five calls and send those five emails. Chances are it will be your best use of 10 minutes this holiday season.

[Dan Richards](#) conducts programs to help advisors gain and retain clients and is an award winning faculty member in the MBA program at the University of Toronto. To see more of his written and video commentaries, go to www.clientinsights.ca. Use A555A for the rep and dealer code to register for website access.

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