

RETIREMENT BUILDING BLOCK



EFFECTIVE WAYS TO REMAIN TOP OF MIND WITH CLIENTS

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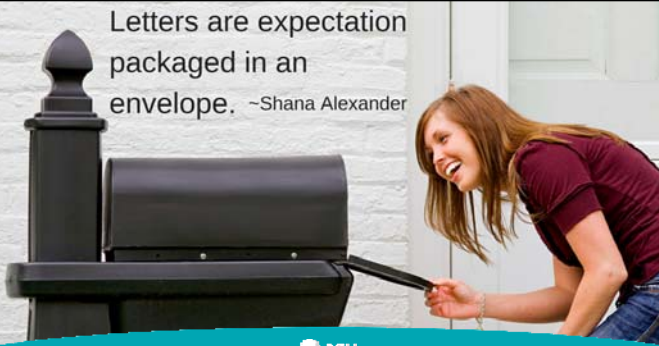
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Letters are expectation packaged in an envelope. ~Shana Alexander



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### More Difficult?

- × Zoom fatigue / screen fatigue
- × Email:
  - easily “swiped left”
  - deleted
  - ignored
- × Covid considerations



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Or...



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### People love receiving

- ✓ Out of the ordinary
- ✓ Considerate
- ✓ Positive highlight
- ✓ Mysterious



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### People love receiving

- ✓ Creates an event
- ✓ Deepens the relationship
- ✓ Will be shared
- ✓ Fun to give




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**"To send a letter  
is a good way  
to go somewhere  
without moving  
anything  
but your heart."**

**- Phyllis Theroux**




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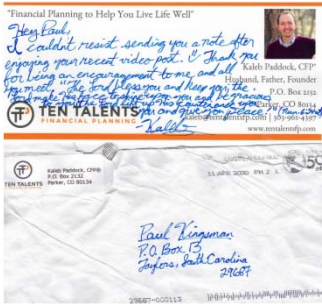
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**Balance between:**



- Creative vs. Practical
- Special occasion vs. Routine connecting
- Considerate vs. Cost (\$\$, time)



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**Practical steps to connect effectively**



- Track
- Create
- Send



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### Tracking

- Clients ranked on revenue generated
- Top 2 quartiles receive most focus
- New clients receive 1st-yr anniversary gift



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### Creating

- Implement easily-repeatable activities
- Don't underestimate impact of inexpensive actions
- Keep it simple
- Commit to it



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### Sending

- Create realistic frequency schedule and timeline
- Have resources ready
- Keep watch for ideas and content



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### Sending

- Don't over think this
- Respond immediately
- Think outside the box



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(HANDWRITTEN NOTE)

Hi John,

Last week I listened to a great interview from Lara Merriken, the founder of Lara Bar. She was featured on a "How I Built This" podcast episode. They feature creative people who pour their hearts into their businesses.

We love helping business owners here at Great Horizon Financial and we wanted to encourage you and your team during this quarter. Enjoy the treats.

-Paul



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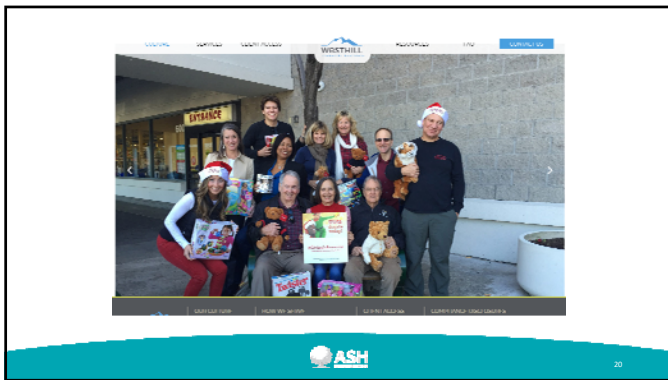
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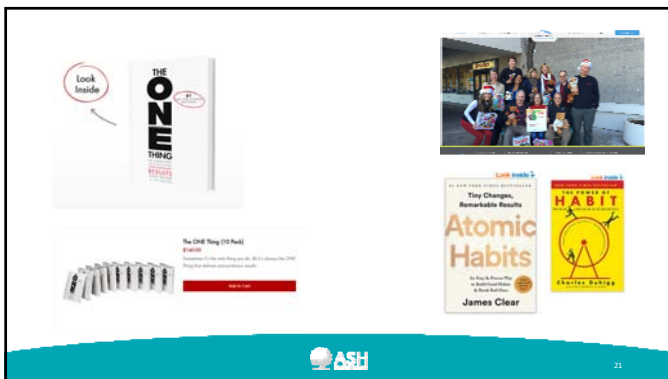
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