



IMPACT
PARTNERSHIP

HOW TO MAXIMIZE REFERRALS VIRTUALLY

You might be thinking, “Referrals? Right now? Seriously?”

YES, SERIOUSLY! NOW is the time to maximize referrals because your clients are loving you now more than ever. It’s time to create opportunities where they can introduce you to their friends and family virtually.

WE WILL COVER:

- “Client-Only” virtual works
- Virtual Town Hall
- Client Appreciation Events
- Client Advisory Board
- Birthdays & Anniversaries
- Virtual Calendar
- Referral Mailer



Educational Opportunities

With the environment changing frequently these days, it's important to continuously engage with your clients regularly, provide insight and clarity on what's happening in the market, and explain how it affects their retirement plans.

Instead of holding one-on-one phone calls or appointments to address these concerns, try holding a "client-only" virtual workshop to cover key points.

For a more casual setting, invite them to a Virtual Town Hall. These can be more frequent than your workshops. Each town hall can cover a specific topic happening today or schedule them after the market closes on Thursday to do your own "After The Bell."

You can also invite clients to send their most pressing questions ahead of your meeting so you're hitting topics concerning to them.

Even though you're only inviting your clients to these sessions, ALWAYS encourage them to forward the invite to a friend or family member who could also benefit from this information. This should be on every email invite and social post.

Since this is an educational experience, your clients may be more willing to pass on your invitation.



Client Appreciation Events

We're all trying to keep ourselves busy in the house, but eventually the "honey-do" list runs short. Why not host a special event for your clients to help them learn a new recipe or skill from their own home? With many small local businesses looking for opportunities to thrive in this environment, it's the perfect opportunity to partner with them for a fun client event.

"From Our Kitchen to Yours"

Find a local celebrity chef in your area who would be willing to host a virtual cooking class with your clients in exchange for promotion to their restaurant or a planned client event at their venue in the future. Have the chef give you the ingredients for the chosen recipe ahead of time so all participants can purchase and have them delivered prior to the class.

This is not only an opportunity to learn a new skill in the kitchen, but can also drive referrals as clients will be impressed you're engaging with them during this crisis and will want to invite their friends.

There are many variations of this event you can implement into your practice. Contact a local wine shop to set up a wine tasting with their top wine expert. Or, host "Trivia Night" with a local company who typically hosts at bars and restaurants during the week.



Client Advisory Board

If you have a client advisory board set up and planned on a spring meeting – **DON'T CANCEL!** Just because you can't meet in person doesn't mean you can't have a great meeting virtually. This is probably the most crucial time to have your board meeting.

This will give you the opportunity to hear candid feedback from your top clients about their concerns and feedback on how you can run your practice virtually.

Topics to Cover/Questions to Ask:

1. Try hosting your first digital workshop with them or have them join you for a “virtual appointment” so you can understand their experience with the software and know how to troubleshoot with future appointments.
2. How can we make our prospects feel comfortable with meeting us virtually?
3. What type of information do you want to read/watch from us as clients? If you weren't a client, how would that message/information change?
4. Would you attend virtual client events with us? If so, what type of events would you like us to host?

Still want to do something nice for them during the meeting as you normally would? Collect their dinner orders from their favorite delivery spots and coordinate a 7 p.m. delivery for each household.



Birthdays & Anniversaries

No one wants to spend their birthday or anniversary alone in their house so make it special for your clients and let them know you're thinking about them on their special day. Many national flower companies like Bouqs.com and 1800Flowers.com are still delivering during this time with safety protocols. A simple surprise gift can go a long way to help your clients feel special and appreciated.



Virtual Calendar

The more your clients know what's going on in your practice, the more they can share with their friends, family, and neighbors. After creating your marketing plan for the month with your strategist, create a “virtual calendar” that holds all of the events or opportunities you're hosting so your clients can pass those dates on to their friends.

Blast the calendar out to your database and post it on your social media platforms to show you're not slowing down during this time and your clients and community can rely on you.



Referral Mail

Send a fun, interesting, and engaging mailer that will make a current client smile.

Ex. Recently Trump pushed through his “stimulus package”. You can piggyback off of this with a [Company name] Stimulus Package? You can mail out chocolate and have text that includes a fun play on words like...

Thank you for being part of our financial family. We are thinking of you, hope you are safe, and we are here to answers any question, big or small. Enclosed you’ll find what we’re playfully calling our [Company Name] Stimulus Package. We hope this brings you a smile and that you’re “stimulated” by the chocolate. Enjoy!

The [Company Name] Family

P.S. If you would like to send a smile and Chocolate Stimulus Package to someone who shares your retirement concerns, we would be happy to send them one. Please call us at [advisor number].

More Ideas for Fun Mailings

- Favorite “Dad” Jokes of each employee (good relationship building)
- Recipes
- Fun ways to engage with grandkids virtually
- Patterned or branded COVID masks for clients/prospects to use
- Hand sanitizer bottles or other COVID essential items to share
- Additional/leftover branded items already on-hand in your office that you could send out with your mailing. Find ways to make these extra branded items bring joy to your clients and prospects!

