



The Elite Adviser

INSTITUTIONAL STRENGTH INTELLIGENCE

The pursuit of excellence demands groundbreaking practices, acute insight and expert skills. Backed up by decades of rigorous study and practical application, the industry leaders at CEG Australia deliver precisely the tools and strategies you need to reach the elite level.

The Keys to Keeping Them Happy

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While we pay plenty of lip service to client service in our industry, truly satisfied clients are a relatively rare breed. For many advisers, the standard of "customer satisfaction" is not particularly high.

This is unfortunate, as highly satisfied clients are potentially your best source both of qualified referrals and additional funds to manage. By making your clients happy, you'll be positioned to grow your business in an extremely efficient and cost-effective manner.

World-class service means going above and beyond. It means raising the bar so that each client receives a unique and personalised experience that differentiates you from other advisers, that clients find unforgettable and that competitors can't match.

1. **The competence factor.** You must provide your clients with competent investment management services, account management services and a general level of professionalism that's appropriate to the significance of your services.
2. **The hustle factor.** Make it your mantra to do what you say you're going to do when you say you're going to do it—and remember it's more about reliability than speed.
3. **The no-surprises factor.** Communicate problems as they arise and regularly solicit feedback from your clients to find out what is and isn't working for them. Know that even when you've solved a problem, you aren't really done until you let the client know that it's been handled.
4. **The warmth factor.** Be responsive and friendly regardless of how outgoing you are by nature. Your clients expect you to regularly take time to reconnect with them and keep the personal relationship current and strong.
5. **The first-to-know factor.** Communicate regularly about any information that significantly affects your clients. Find out how often your clients want to be updated and in what fashion.
6. **The listening factor.** Clients want to be heard, but most advisers want to talk. Clients often feel that we don't listen to or let them finish their questions before we try to answer them. When you allow someone to fully finish a story, comment or question, they feel heard, acknowledged and validated.

7. **The client-centered factor.** Clients need to feel individually heard and understood, and expect to see their needs specifically addressed with individualised, viable, alternatives. Forget the one-size-fits-all solution.