IdeasForAdvisors.com

INNOVATIVE IDEAS TO GROW YOUR BUSINESS NOW

April 2014 Issue XIII

PROFESSIONAL AND IMPRESSIVE POLICY DELIVERY

Question: How do I ensure my clients feel valued?

Answer: Exceed client expectations.

Many advisors think when they make a sale, their work is done. However, the successful advisor knows there is always an opportunity to go the extra mile. To maintain a superior level of client service, advisors need to be invested in providing high-impact marketing strategies to satisfy a client's needs and expectations. To grow your business, depends on the way you present yourself to clients and prospects.

Are you building client appreciation with your current policy delivery? Is your current policy delivery referral worthy? Policy delivery is an opportunity to enhance your credibility. To improve your standards consider the following policy delivery meeting suggestions:

- **Deliver a custom package:** When a client receives their policy in a high-quality wallet or customized handcrafted case, the importance of their decision is emphasized.
- **Write a congratulatory letter:** Avoid buyer's remorse by sending a hand-written note congratulating them on taking a major step toward a secure financial future.
  Read Examples Here...
- **Give supporting information:** Make sure to provide any extra documents that provide guidance about their policy or to help with their financial future. For example you can include " I am Your Life Insurance Policy letter", " Your Will Planning Workbook ", " The Financial Priority Pyramid ", " Get Organized / Budget Worksheet ". (If you would like a copy of any of these, send us an email: michelle@ideasforadvisors.com)
- **Plant seeds for future discussions:** Use this meeting as an opportunity to layout your customer service standards. Discuss what they can expect from a communication perspective and how often you want to meet with them. Strategize the next step in their financial security plan.
- **Referrals:** Be sure your client understands that you are open for business and that referrals are always appreciated. Don't forget to leave extra business cards!

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Michael Morrow, CFP

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PROFESSIONAL AND IMPRESSIVE POLICY DELIVERY CONTINUED

Personally delivering the policy is a step in the sales process that should not be skipped. It will elevate the entire sales experience and assure the client that they made an important step in protecting what matters most to them. It is an opportunity to cultivate a long-term relationship and set you apart as a professional who is invested in their clients.

A Lasting Impression

There is a direct and critical link between a client who feels valued and their loyalty to you. Take steps to make the intangible, tangible through professional, impressive policy delivery.

Every Financial Advisor needs proven, one-of-a-kind marketing ideas. Michael reveals marketing strategies that you can take home and implement immediately, that will get results.

Michael Morrow, CFP doesn't just talk marketing; he has been a Financial Advisor for 25 years. He understands the importance of client appreciation and the power of marketing strategies. Mike is an International Speaker who shares his award-winning ideas all over Canada, The United States, Mexico, Asia, Australia and New Zealand and at Million Dollar Round Table events, including The 2012 MDRT Experience and The 2012 and 2009 MDRT Annual Meeting.

Invite Mike to your next event and find out why he is known as:

The Leader in Marketing Strategies™

michael@ideasforadvisors.com
www.ideasforadvisors.com
(807) 684-1805 / toll free (877) 684-1805
All of Michael's presentations qualify for CE credits

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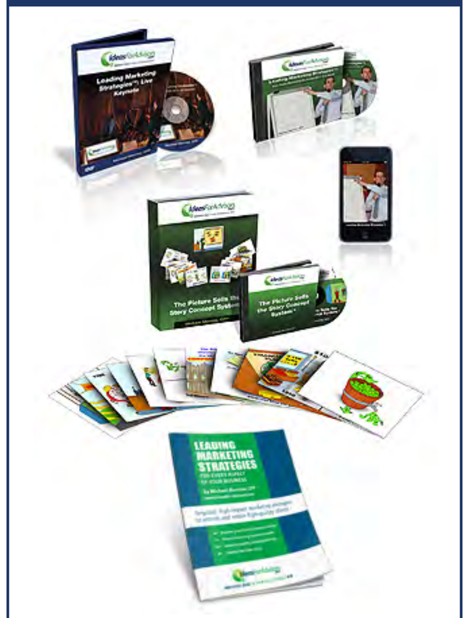

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"Your presentation was brilliant. You are a wealth of great ideas and your humor really kept me engaged. Production has gone up in our office because of your presentation."

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200 - 905 Tungsten
Thunder Bay, ON Canada
P7B 5Z3
1-807-684-1805
michael@ideasforadvisors.com