

# Your Comeback Plan:

How Will Your Client Experience  
Need to Evolve?

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NOW!**

Things have changed. They have changed for you and they have changed for your clients. And that raises some important questions.

- Exactly how have your clients' needs, challenges and expectations changed? (They have.)
- How should those changes impact your client experience? (They will.)
- What is the risk of doing nothing? (It's real.)

The problem is this. If you don't have a process in place to understand those changes (and the implications for your business) you're flying blind or relying on assumption. Neither is good for your clients or your business.

Your client experience comeback plan should assess how client needs, expectations and challenges are evolving and what that means in terms of:

- How often you meet with clients
- How you meet with clients
- Who is involved in client meetings
- If, or how, you connect via social media
- The tools you provide
- The kinds of communications you share
- The scope of your offer

Remember that your clients have been learning about how the client experience can evolve as they interact with other organisations. As a result, they have not only seen what is possible, but have developed new expectations. We need to keep pace.

To help you examine the client experience you'll need to deliver, we've created a brief [Client Experience Assessment and Comeback Plan](#). It will allow you to take stock of where you are and how you need to evolve.

You can use the questions on the following pages to guide your thinking or click on the link below and complete this brief assessment online. If you use the on-line assessment, we'll follow up with a 'Readiness Score' along with additional insights on how client experience is evolving and how you can take action based on your results.

**As you consider these questions in the assessment we've created, keep an important point in mind.**

*It's not the job of your clients to tell you what your client experience should be. It's your job to understand where they are challenged and what they need, expect and value and to build an experience that supports them.*

## Your Client Experience Assessment and Comeback Plan

**GET STARTED**



**You can use the online assessment for a more detailed plan, or use the following as a guide to your thinking:**

### **1. How much contact is enough?**

Most advisers are reaching out more than ever before to reassure clients. In the process, clients may become used to more proactive contact and they may need more contact to help them deal with lingering anxiety.

Going forward advisers will need to evaluate how often they need to meet with clients both formally (to understand how their needs are changing) and informally (to ensure they understand how clients are feeling).

### **2. How will your clients want to meet?**

Almost everyone has become used to virtual meetings. Now that clients have been 'trained' on the process, it's important to understand if that has shifted their thinking. Do they find web-based meetings more, or less, helpful or engaging?

Do they see a virtual option as an easier way to get both spouses/partners involved if one finds it difficult to meet in person? Do virtual meetings open up the possibility to easily include others, such as family members or other professionals?

Going forward advisers will need to incorporate meeting formats that are working, which may result in offering clients more choice.

### **3. Do clients want to connect differently?**

During periods of isolation we all naturally seek to connect in different ways. For some that means using social media more actively. For others that means taking on-line courses or attending webinars. Those changes in behaviour may open up opportunities and/or expectations regarding how you connect with your clients.

Going forward advisers will need to ensure that they show up where their clients are going to connect and learn and, for many, that means, having a strong presence on social media.

### **4. Do clients expect more 'self-serve' options?**

Many firms have accelerated the implementation, or adoption, of technologies that put more control in the hands of clients, from e-signatures, to booking meetings online to access to information via a client portal or even access to education. Increasingly clients are becoming used to 'self-serve' options in all areas of their lives and that will influence expectations.

Going forward advisers will need to acknowledge that clients have learned how to be more self-sufficient and that they will need to allow clients to engage online as needed.

### **5. What challenges are your clients facing?**

The most recent research from Absolute Engagement showed an increase in interest in non-financial topics, including health and wellness. Advisers who can understand the challenges their clients are facing and use that to provide personalised communications (e.g., emails, articles, resources, webinars) are demonstrating true leadership.

Going forward advisers will need to demonstrate leadership through their communications and ensure they are providing support on the topics that are most important to clients at any given time.

### **6. Are your clients thinking differently about what is important?**

The pandemic has caused all of us to think differently and to re-evaluate many aspects of our lives. While many of those shifts are purely personal, some will impact how we plan for the future and the scope of the offer you need to provide (e.g., insurance, multi-generational planning, philanthropic giving). For some advisers that may include incorporating non-traditional services (e.g., health and wellness, grief counselling) either directly or via expert partners.

Going forward advisers will need to evaluate their offer to ensure it reflects what is most important to clients.



Asking yourself the right questions is a good starting point when you are thinking about evolving your client experience. However, only your clients can tell you exactly what they need, want and expect. For that reason, we believe that a robust process to gather input from your clients and the support to translate that into an elevated client experience is critical.

Absolute Engagement can help.



Nucleus Financial is working with Absolute Engagement to provide you with access to their Client Insights programme with preferential pricing. The programme allows you to easily and efficiently gather input from your clients to ensure that your client experience reflects what they want, need and expect going forward. As a result, you'll create a meaningful comeback plan.

[You can learn more about Nucleus Financial's programme or get started here.](#)

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**To book a demo with Absolute Engagement, please:**

**Use our scheduling tool to find a convenient time to meet, or  
Contact [support@absoluteengagement.com](mailto:support@absoluteengagement.com) to set a time.**

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