



Top Producers Path to Gold

Red Carpet Client Communication System

Creating a business plan may be one of the most useful tools for managing and expanding your practice. One common factor among top producers is that they have a detailed business plan. A Red Carpet Client Communication System should be included in every Advisor's overall business plan.

Take the time to answer these very important questions regarding your client process.

- What message are you trying to convey to your clients?
- Who are your target clients and how do you differentiate yourself from the competition?
- Where do you expect the business to come from?
- Do you have a clear process for implementation?

GSG can support you in creating a system. It's important to never leave this process to chance.

Once you have answered the above questions, you are well on your way to establishing your unique, systematized process for client communication, and to expanding your practice.

Consider these methods of communication as part of your plan.

1. Written communication.
2. Verbal communication.
3. Client events including: client appreciation events, advisory board meetings, participation on a board or local charity that is of interest to your "A" clients, birthday luncheons, etc.
4. Office environment and process for client meetings.

As you can see, Red Carpet Client Communication involves a great deal more than simply sending out birthday cards, holiday cards and annual review letters.

We have commonly heard the phrase that making a financial decision is often prompted from an emotional state, rather than

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Top Producer Success Corner – Chip Lutz, San Antonio FCU


At SACU, client communication is absolutely key. Each appointment is concluded with an introduction of each of the staff members. Weekly meetings are held to update each staff member on client information. Chip and his

entire team are able to assist any member because they are all aware of any pending transfers, retirement dates, etc.



If you want to learn more about how to implement the strategy discussed, you can contact any one of the following GSG team members at 1-800-915-1004: Tom Ostrand, Reagan Grimes, and Cynthia Pollard.

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purely an intellectual state of mind. Therefore, we must support our client’s positive feelings about our care for their financial lives. A Red Carpet Communication System is a key strategy to making this work in your practice. Please work with your GSG Program Manager for specific ideas of how to implement this system in your practice. 

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