

BOLD!

Marketing
Communication for
Financial Advisers

Here to help
YOU
to help
YOUR CLIENTS

Right now, your clients need you.
They need your expertise, advice and leadership.

boldcorp.com.au

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Over the last couple of weeks, we've been quietly putting together a plan for helping our clients so that they can support and help their clients. Rather than rush in, we've waited until now because we understand there have been greater priorities for you and your clients to consider relating to health, family, employees, financial and business matters. We now believe it's timely to offer our help.

We're here to help

As business owners, we too have needed to take stock and consult with our financial professionals and implement policies that range from social distancing to taking action to preserve cash. Rest assured, as a business we're sound.

On the matter of social distancing, with the majority of our clients located around Australia, we've worked remotely for years so we will simply continue doing what we do by telephone, email, Skype, Zoom and other programs.

Having worked through our own business circumstances we've also implemented a plan of action and like all businesses, our focus is on remaining financially healthy and helping our clients do the same.

We acknowledge there are many issues for you to consider and cash flow is top of your list.

While you will be closely monitoring expenditures, negotiating new terms with suppliers and following up late payers, you also need to maintain cash 'in-flow' now and in the future when this event is over.

Achieving this will include staying in regular contact with two key groups: your clients and your team.

If you find this document helpful, please pay it forward to help any of your clients who may be business owners so they can stay financially healthy too.



Now isn't the time for radio silence

Right now, your clients need you. They need your expertise, advice and leadership.

Social distancing is a necessity in the new world of Coronavirus and while face to face meetings might be temporarily on hold, the future of your business depends on how you create, or continue, to maintain meaningful interactions with your clients.

It's all about business continuity for you and reassurance for your clients. The key is to act quickly to communicate proactively, give clear explanation of regularly changing information as it applies to your clients financial circumstances.

Your clients will be very glad (relieved and grateful) to receive informed, professional and level-headed reassurance.

Here's how we can help YOU, to help YOUR CLIENTS.

For YOU

If you already have a well-considered marketing communication program in place, keep going.

Here are some other matters you might consider:

- If you've planned ahead, (which is our usual MO), talk to your communications provider about reworking your schedule to focus on themes and topics suitable for current and emerging circumstances.
- If you need to prepare additional client communications outside your current schedule, brief your communications professionals to do it for you. An experienced writer will save you a lot of time.

- If you find you need to write communications yourself, ask your communications provider to review, edit and finesse it for you.
- We know you are busy, but regular contact is the key. Try to avoid long delays between communications.
- Be aware that the tone of your communication is extremely important. Many of your clients will be feeling anxious so throw-away lines, seemingly harmless jokes and rushed emails can be damaging at any time, but even more so now.
- Your approach needs to be sincere and genuinely 'helpful'. Provide firm, decisive and honest direction choosing professionally-friendly words that neither diminishes importance or heightens emotion.
- It is likely your clients will also need perspective. Reaffirming your business approach, financial planning model and your previous advice will serve not only as a reminder of your logic and expertise, your clients will find it confidence building and empowering to know you're working in their best interests.
- Of course, there's no place for sales talk in your vernacular at this time.
- Should you choose to write your own content, be aware that when there are numerous or fast changing issues, you stand to lose a lot of time organising your thoughts. The key is to follow a writing structure that focuses the message, such as:

What's the specific issue? (within the bigger matter)
 Who does it affect?
 Why action is needed?
 What's the next step? and by
 When?

- Avoid overloading your communications with too many issues and too much detail that could be misinterpreted. Save complexity for one to one discussion.

- Get a second opinion. Here at Bold!, even during normal times, two sets of eyes review every item we prepare for our clients (and ourselves). If you need to explain something to your proof reader, consider it a red flag that the message isn't 100% clear and needs rewording.
- Before you Send or Post anything ask yourself this:
"How would I feel if I received this?"

For your TEAM

Remember your team members will be feeling anxious too, especially as there's a lot of information to digest.

While you will no doubt be communicating regularly with them, you will also need to provide a written summary of your actions and instructions as this will help keep everyone on the same page.

Follow the same approach with your team communications and deliver firm direction and a compassionate tone.

And importantly, apply the "How would I feel?" test and get a second opinion before you press Send.

Next Steps

Ultimately, we're all in this together.

For us, it's about reassuring you that we're here to help you so you can help your clients.

We have experience and expertise that we can share with you, so that when you emerge on the other side of this event, you'll be in the best possible position for making up lost ground.

Please give us a call if we can help YOU to help YOUR CLIENTS.

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Copy Writing	Marketing Communication	Web Content Writing	Website Design	Social Media	Graphic Design
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