



The Ultimate Checklist: Build Stronger Relationships with Your Clients

By Matthew Collis at AGBeat.com

Are you keeping in touch with your sphere of influence (SOI) effectively? Below is a quick and easy checklist to ensure you're taking the right steps to build strong relationships and stay "top of mind."

- Send out a monthly e-Newsletter that your clients will find interesting and informative
- Make quarterly keep in touch calls
- Send out monthly direct mail pieces to your best clients
- Plan client appreciation events
- Sponsor local sports teams, clubs, or organizations that your clients or their children participate in
- Set up your clients on drip email nurture campaigns
- Wish your clients a happy birthday when the time comes
- Refer the services your clients offer (if applicable and if you trust that they do good work)
- Volunteer to recommend clients the services of other reputable professionals in your industry (professionals who offer services that don't conflict with yours, of course)
- Conduct a seminar every quarter (for example, a REALTOR® may want to conduct seminars on home ownership)
- Get to know your "A- List" clients on a personal level, showing a genuine interest in their family, job, and hobbies
- Meet your "A-List" clients face-to-face on a regular basis for coffee, lunch, or a round of golf

We hope that this checklist has given you some useful ideas on ways to better keep in touch and build relationships with your clients. Remember, it costs five times more money to get a new client than to retain an existing one. Acquiring new clients is the hard part. Once the client is yours, make sure you implement the suggestions in the above checklist to keep them.