

Ensure your practice has the capacity to deliver experiences clients' expect because consistent, world-class service drives satisfaction, referrals and growth.



**Define client service model and communicate through a menu of services**

- Segment clients and define a consistent client service model per segment
- Develop a system to regularly gather client feedback to continually improve service model



**KEY ACTION: Use these tools to define service model and communicate a menu of services**

CLIENT SEGMENTATION TOOL

CLIENT SATISFACTION SURVEY



**Deliver a referable service experience**

- Use prepared agendas for client meetings based on client preference service model
- Proactively contact all clients 4x per year
- Return calls the same day and document all client activity in CRM

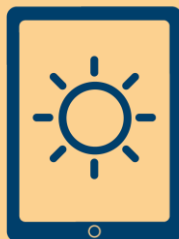


**KEY ACTION: Use these tools to deliver a referable service experience**

CLIENT/PROSPECT CONTACT CALENDAR CONTACT MANAGER

ADVISOR MOBILE/CLIENT VIEWER CONTACT SERVICE TOOL

CLIENT SERVICE MODEL & AGENDA TEMPLATES STATUS MANAGER



**Provide a compelling digital experience**

- Obtain all client/prospect email addresses and mobile numbers
- Capture and track goals with all clients online
- Leverage the features of the client secure site
- Enroll clients in TotalView



**KEY ACTION: Use these tools to provide a Compelling digital experience**

ONLINE CLIENT EXPERIENCE RESOURCE CENTER (ADVISORCOMPASS)

ONLINE FILE MANAGER, BOX (eFILE, eFORMS, eSIGNATURE)

CLIENT CONCIERGE CHECKLIST



**Conduct effective client meetings**

- Regularly update documented client interests, preferences, life events, beneficiaries
- Discuss progress to clients' goals
- Ask clients for referrals



**KEY ACTION: Use these tools to conduct effective client meetings**

ADVISOR MOBILE INSIGHTS

NAVIPLAN/MONEYGUIDEPRO/CONFIDENT RETIREMENT TOOLS

PORTFOLIO MANAGER (PMT) AMERIPRISE BROKERAGE PLATFORM