

Saying Thank You to Your Clients

You should have both formal and informal ways to say thank you to your clients, teammates and family. This tip sheet will help you come up with your own ideas.

1. Client events are a great way to show your appreciation. Keep your target audience in mind as your assistant helps you plan these events. You need to appeal to those you are working with – consider ideal client relationship.

- ☞ Take a group trip to a sporting event - rent a private box
- ☞ Take a group for ski, golf or tennis lesson
- ☞ Group fishing or boating trip
- ☞ Participate in a wine tasting in a vineyard, exclusive restaurant or country club
- ☞ Hold a tea party or orchestrate a cooking class
- ☞ Orchestrate a luncheon with a fun, motivational or interesting local speaker
- ☞ Take a trip to a historical site, garden, museum or gallery
- ☞ Take a group to a lecture series, theatre or symphony - host an exclusive showing
- ☞ Orchestrate a family picnic involving the kids

2. Personal handwritten notes are another great way to show your appreciation and wow your clientele.

- ☞ Add a note to your birthday cards
- ☞ Note the anniversary of when you began working together
- ☞ Personalize your holiday cards
- ☞ Handwritten personal letters - it's a lost art
- ☞ Recognize special occasions (child's birth, graduation, a promotion etc.)
- ☞ Thank you notes (including for referrals)

3. Small Gifts can enhance the relationship and don't have to be expensive (remember the rules). When using promotional items, your firm may have a company store; if not, there are also multiple web sites you can visit to order promotional type items and gifts. Be sure to stay within the rules of your firm's branding standards! Also be sure to choose gift that are pertinent to your particular client target and be creative! Small gift examples could include:

- ☞ Promotional items such as bags, umbrellas or golf paraphernalia
- ☞ Books of client interest
- ☞ A magazine subscription
- ☞ A gift certificate to a local restaurant
- ☞ Tickets to a show or event
- ☞ Flowers
- ☞ Gourmet food baskets or specialty customized basket
- ☞ Charitable donations in client's name
- ☞ Annual diary, calendar or executive gift
- ☞ A binder or notebook for clients to keep their records in (tax information, statements, account documentation etc.)

4. Miscellaneous

- ☞ Coordinating efforts with the client's other advisors typically is greatly appreciated by the client not to mention it helps you create additional potential centers of influence and referrals.
- ☞ Client lunch meetings or inviting them for drinks is another simple way to say thank you and deepen the relationship.



Team Reciprocation Ideas

Make sure you match your 'reciprocation' ideas to each member of your team. Just as it is important to know what your clients enjoy and appreciate, you need to know that same information about your team member too! Here are some thoughts:

- ☛ Lunch or dinner vouchers/gift certificates for a team member and spouse/significant other
- ☛ Tickets to the movies, theatre, sports games (depending on what they enjoy)
- ☛ Flowers, specialty baskets, balloons
- ☛ Leave them thank you notes on their desks
- ☛ Fly them to NY City for the weekend!
- ☛ Present them with team or company branded items
- ☛ Give a gift certificate to a spa

Most importantly, make sure your reciprocation ideas are thoughtful and apropos to the recipient. Get creative.

You should also be sure to have group events where you celebrate. You should celebrate successes as a team but also be sure to recognize individuals on the team when it is appropriate. Here are some thoughts:

- ☛ Team lunches, drinks or dinner
- ☛ Team excursion to bowling alley or laser tag game
- ☛ Team excursion to sporting event
- ☛ Team excursion to winery
- ☛ Team excursion to historical site, museum etc. (only if team members have an interest!)
- ☛ Have a "Rewards Board" in your office where you can post the Most Valuable Team Member for that month or quarter! People often like to see their name or picture in print or in public for recognition
- ☛ Have a 'fun item', a toy of some sort that gets awarded to a member of the team each Monday at your team meeting – again something they can place on their desk and can be seen by others and is conversational for clients coming in. Have some fun with this and get creative. It's amazing how motivating small ideas are to many people. They are unbelievably proud when they have that \$9.99 elephant statue on their desk for the week as they were the most valuable team member for the prior week.