

Improving client communications

A Distribution Quality Management Programme learning

They key to making effective sales is to establish genuine relationships with your clients. Why? A sale that is purely transactional can make the experience forgettable – and your client could be more likely to cancel their product. But a strong relationship built on constructive communication and a clear understanding of your client's preferences can not only help you to meet their needs, but is more likely to generate future sales and referrals. Here are our recommendations for how to build your client relationships and improve your communication with them.

6 steps towards achieving success:

1 Understand your client's communication style

Does your client prefer to receive written communication, texts, or do prefer face-to-face interaction? Learn how your clients like to communicate and use this for future contact.

2 Keep better records

Keep a summary of your discussion and send it to your client for approval. This means they have a record to refer to when you next get in touch.

3 Review your database

Segment the data into opportunities. Create and send a regular feed of information that's relevant to each segment, so that it's timed and targeted. Remember to ensure you have the correct marketing consent before you contact your clients.

4 Tailor communications

Use data analysis and fact-finding to decide which clients have a propensity to purchase, and which of those who prefer to just be kept informed. Don't flood clients with too much information.

5 Set expectations

Make it clear to your clients what the next steps in your service will be, explain why, and let them know when they can expect to hear from you next.

6 Be prepared to listen

It's important to pay attention to what your clients say. Prepare before any meetings, review the results of communications and any feedback you've received, and refer to notes and any relevant information you have collected.

For Adviser use only

Legal & General Assurance Society Limited. Registered in England and Wales No. 00166055.
Registered office: One Coleman Street, London EC2R 5AA. We are authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority 2614-1 01/22

