

Making Effortlessly Effective Client Communication with Market*r



Effective communication plays a key role in your client relationships. So why is it often an afterthought? We know you're busy taking care of clients and don't have time to delve into marketing and communications - that's why we created Market*r.

Market*r allows you to lean on our expertise and save time, by using our content and templates. Below you'll find some of our thoughts and best practices for effective client communication, as well as how you can make the most of Market*r.

As many experiences and interactions go digital, it's more important than ever to keep the lines of communication open. You're a trusted source of information for your clients, but no need to stick strictly to business. Client communication is also about cultivating relationships.

In fact, we like to think of them in two categories:

1. **Inform and Update** — What do your clients need to know? Share changes to business practices, information on annual/quarterly reviews, market commentary and performance, and how your firm is adapting.
2. **Connect and Relate** — How do you foster client relationships? Share birthdays, holiday notes, celebrations, milestones, fun facts about your team, and other lighthearted content. Get to know your clients and prospects, and let them get to know you.

Email is typically the most popular, but social media can also be a powerful

communication tool. Holiday office closure? Include the update in your email, but also post it to social media so clients can get real time updates.

Client Communication Best Practices

Initially, crafting client communications may seem complex. To keep it straightforward, consider the guidelines here. Generally, you should:

1. **Be thoughtful.** Ensure your communication has a specific purpose or value-add, and don't just send for the sake of sending.
2. **Be consistent.** Establish a cadence that is right for your clients and your firm, and hold yourself accountable — whether that's weekly, monthly or quarterly.
3. **Be timely.** Choose the right date and time to send and monitor engagement. Pro tip: Check the Market*r Knowledge Center for guidance on optimal times to send email and social media posts.
4. **Be clear.** Use layman's terms. Your clients may not understand all the industry jargon (that's why they hired you!), so don't speak or write over their heads. If you're unsure, use a family member or friend who is not in the industry to review your communication.
5. **Be polished.** Be sure to proofread, then proofread again. Reading out loud is especially helpful, since when scanning, our brain tends to fill in any information gaps.
6. **Be compelling.** Include a call to action. It could be as simple as sharing an interesting article you recently read.

Now that you know the elements of effective client communication, you may be wondering, "How do I compose and deliver my communications?" That's where Market*r comes in.

Meet Market*r

Market*r is a powerful platform with content created by marketing professionals who stay ahead of the latest industry trends. Here's how Market*r can help improve your client communication:

Fully customizable templates. Under the "Assets" tab, you'll find our email themes, each with a variety of fully customizable templates. Use our templates or make it your own.

“Set it and forget it” capabilities. Schedule communications in advance, and set reminders. We’ll give you heads up 24 hours before it goes out.

Streamlined onboarding. Use our onboarding email series to welcome new clients and stay on top of follow up. Customize your messaging, schedule, and we’ll take care of the rest.

Exclusive Content. Leverage content that is written by our investment team and updated on a weekly basis. This is a great way for you to engage and interact with your clients.

This month, look out for our holiday content. We’ll add it to the platform so you can get all those communications scheduled in advance. We also have everything you need for running virtual events and webinars, and recruiting top talent to your growing firm, one of our most requested series.

Need Support?

Our chat feature inside the platform will connect you with our team to answer any questions. Just hit that “let’s talk” button in the bottom right corner. You can also find training resources and marketing best practices in our Knowledge Center.

Check out the platform and our newsletters to stay updated on the latest and greatest coming to Market*r.

Do you use Market*r? What are some of your favorite features?

Don’t use Market*r, but want to check it out? **Schedule a demo to see how Market*r can elevate your client communication.**

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