

PRESENTATION 4: *What Client Representatives Really Want, Part 2*

Having a positive trait is important. Making it obvious to client representatives may be even more important.

Demonstrating recognition.

The person in your office in charge of recognition is the person whose job it is to answer the phone.

Friendliness is important, especially when speaking on the telephone or using e-mail. When speaking on the telephone, look into a mirror and smile. When using e-mail, use a friendly salutation: "Hi, Mr. B." "Hello, Mr. B." "Good afternoon, Mr. B." And so on. Not "Mr. B." Abrupt and unfriendly.

To demonstrate recognition, you need to record important information about individuals: whether or not they are married, name of spouse, names/ages of children, passions, and so on. Use client relationship management (CRM) tools for the purpose.

Active listening is an important skill to master.

Gift-giving, in general (e.g., during the holiday season) or to recognize a referral.