



- TOOLS:**
- CLIENT SINCE FIELD
 - BIRTHDAY/ ANNIVERSARY REMINDERS
 - PERSONAL INTERESTS
 - MAIL MERGE

Observation: It is far more cost-effective to keep existing clients than to get new ones. You can keep clients longer by giving them reasons not to leave. For example, many advisory firms will reward clients at certain milestones (1 year, 2 years, 5 years, etc). This will lead to clients staying with your firm longer to receive the rewards that await them. Using Redtail CRM, we can manage how often and how best to reward them.

Directions:

1. Populate the 'Client Since' field, Marital Anniversary Date, and DOB for each of your Active Clients.
[CONTACT RECORD > CONTACT DETAILS > EDIT](#)
2. Record client hobbies, interests, beliefs, or priorities in the 'Personal Interests'.
[CONTACT RECORD > KNOW YOUR CLIENT > MISC. CLIENT INFO](#)
3. Use the Reminder reports to find Marital, Birthday, or Client Since milestones.
 - a. Marital Anniversaries. [REPORTS > REMINDER REPORTS > WEDDING ANNIVERSARIES](#)
 - b. Birthdays. [REPORTS > REMINDER REPORTS > BIRTHDAY REMINDERS](#)
 - c. Client Anniversaries. [REPORTS > REMINDER REPORTS > CLIENT-SINCE ANNIVERSARIES](#)
4. Create and upload Mail Merge templates for Birthday cards, Anniversary Cards, Client Anniversary cards, etc.
[MANAGE YOUR ACCOUNT > MAIL MERGE TEMPLATES > ADD FILES > START UPLOAD](#)
5. Send cards to contacts celebrating anniversaries.
[CONTACT RECORD > COMMON TASKS > MAIL MERGE](#)

CATEGORY:	COMMUNICATION CADENCE:	FREQUENCY:	METHOD: PHYSICAL	METHOD: DIGITAL
A	Newsletter	Monthly	Postal Mail	Email
	Review	Annually	Face-to-Face	Video Communication Tool
	Birthday Acknowledgement	Yearly	Postal Mail	Email
	Social Media Engagement	Quarterly	NA	All available platforms
AA	Newsletter	Monthly	Postal Mail	Email
	Review	Semi-annually	Face-to-Face	Video Communication Tool
	Birthday Acknowledgement	Yearly	Postal Mail	Email
	Check-in	Quarterly	Email	Phone/Text
	Social Media Engagement	Quarterly	NA	All available platforms
AAA	Client Since Anniversary	Milestones	Postal Mail	Email
	Newsletter	Monthly	Postal Mail	Email
	Review	Quarterly	Face-to-Face	Video Communication Tool
	Birthday Acknowledgement	Yearly	Postal Mail	Email
	Check-in	Monthly	Phone	Phone/Text
	Social Media Engagement	Quarterly	NA	All available platforms
Personal Client	Client Since Anniversary	Milestones	Postal Mail	Email
	Newsletter	Monthly	Postal Mail	Email
	Birthday Acknowledgement	Yearly	Postal Mail	Email
	Social Media Engagement	Quarterly	NA	All available platforms

6. Record the gift, event, and date sent as a note in the contact record.
[CONTACT RECORD > QUICK ADD > NOTE](#)

Result: People spend time and money on what is important to them. By acknowledging important milestones in clients' lives, they will feel appreciated and valued—which leads to referrals!

Helpdesk Link: <http://bit.ly/howtoRTU>



Client Appreciation Occasions:

Here are examples for how to express your appreciation to your loyal clients on various occasions.

Annual Client Dates

Marital	Flowers Anniversary reminders Bottle of wine
Client Since	Appreciation call Interest based gifts Event or show tickets
Birthdays	Card Call to sing happy birthday Give donation on their behalf

Annual Events

New Years	Countdown party Calendar
Valentine's Day	Flowers Singles event
Mother's/ Father's Day	"Make your own bouquet" at the office Poems via email
4th of July	Reserved seating for fireworks viewing Themed email
Thanksgiving	Send holiday wreath Send out favorite recipe
Holidays	Advent calendar Email with video of staff singing Charter bus to street fair

Client Life Events

New Baby	Gift from registry Interest based gift Onesie with office name/ logo
New Puppy	Welcome pawty Gift basket of treats Toy or branded leash
Graduation	College planning tips/ planning session Gift basket
Marriage	Gift from registry Marriage counseling book on finances
New House	Unique housewarming gift Branded candle
Retirement	Send out years/days since retirement email Give "Bucket-list" related gifts
Asset/ Net Worth Milestones	"Congrats you're a millionaire!" Card Email acknowledging a certain amount in savings

**All of Redtail's best practice recommendations in these "How to Handle" documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*