

Delivering breakthrough value



DWS Team Edge best practice series

Provide your team and organization with ideas and guidelines to become more efficient and impactful when working with clients.

Best practice: Client office visit experience

Face-to-face client meetings in your office provide a terrific opportunity for you to demonstrate your standards of care and your attention to detail, leading to enhanced client relationships.

Best practice: Develop a repeatable process to guide your preparation and execution.

Steps in this process may include:

- _ Create a pre-meeting packet that you send a week prior to a scheduled meeting.
 - It may include a parking voucher, “tips” for first time visitors, and a checklist of what to bring to the meeting.
 - If you’re located in an area with appealing attractions, you may also include information on these.
- _ Personally greet clients in your lobby when they arrive. If on a team, consider having the entire team there to say hello.
 - This demonstrates that you value the client, and it provides an opportunity for you to reinforce the depth and breadth of your team. It also ensures a personalized greeting, and it reduces the uncertainty that may come from a receptionist greeting.
- _ Personalize the experience: Identify and capture the client’s preference for drinks and snacks.
 - This is both pleasing the client and sends the message that you are organized, caring, and in tune to their preferences.
 - On your team calendar, add “Client greeting” 10 minutes prior to each appointment to provide coordination and consistency.
- _ Keep fresh flowers in your meeting room; they help create an ambience, and they demonstrate professionalism and attention to detail. *Some teams cluster their meetings into specific weeks to keep costs down.*
- _ Use nice glassware and china
- _ Keep all areas of your office clean and neat. *A sloppy environment sends a negative message to clients.*
- _ Never have confidential client information visible
- _ As with all client materials, use higher quality paper, and be sure to be consistent with your color schemes and themes.

Paying attention to the experience that clients have in your environment can have a significant impact on clients’ overall perception of your practice. It also helps you and your team feel more organized and professional, further enhancing your confidence and morale. Take the time to develop your own process to ensure that you are optimizing your client interactions.



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