

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: Personalize your newsletters and websites

Many teams provide a newsletter to their client base, prospects and centers of influence (COI).

The benefits of a newsletter include:

- _ Efficient way to drip on and stay in front of clients, prospects, and COI's
- _ Introduces / reinforces solutions and key elements of your comprehensive wealth management process
- _ Provides an opportunity to educate / inform clients on key topics such as, tax law changes

Many teams dedicate a section to developments in the personal lives of team members. This area appears to be the one that resonates most with clients. The most consistent and prevalent client reaction to this section is that they like the “personal stuff.” In some cases, clients have responded, “When we get your newsletter, we go right to the part that talks about the weddings, graduations and other key elements of the team members’ lives.”

Teams may title this section, “Team Happenings,” or “Team Celebrations & Milestones.” Included in this section:

- _ Births of children/grandchildren
- _ Charitable causes/activities
- _ College acceptances, graduations
- _ Accomplishments – run marathon, half-marathon, triathlon, hole-in-one
- _ Work anniversaries
- _ Milestone birthdays
- _ Achieving a designation, like the CFP
- _ Team outing tidbits – who won when you went bowling as a team, go cart racing, laser tag, etc.

Best practice: Have one team member in charge of this process so that it gets done in a timely and effective manner.

Including personal elements helps clients feel more connected to the team, and it provides ample discussion points going forward. Clients have even commented that they, “Feel like part of the family when we know what’s going on with team members in their personal lives.”

To deliver the desired results, people need to open it and read it. Sharing personal milestones and accomplishments has proven to be a practice that attracts readers and keeps them coming back for more.



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