

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: Implement a market volatility strategy.

Market volatility is inevitable. What is your strategy to ensure each client know that you are thinking about them, their investments, and the potential impact of market shifts on their goals as well as their portfolio?

For many teams and advisors, the onset of market volatility is a trigger to increase outgoing client discussions. A practice with a number of clients may be challenged by the significant amount of time required to conduct this “hand-to-hand” exercise. It may take days, or longer, to connect with each client.

Best practice: Immediately send the following email to every client:

“Due to the recent increase in market volatility, we are expanding our office hours to provide you with enhanced access. We will be in the office until 8 p.m. each night this week, and from 8 a.m. – 12 noon this Saturday. Of course, you may feel free to call us at any time. We are attentively monitoring the markets and your portfolio. We look forward to connecting with you.”

Think about the message this communication sends:

- You’re paying attention.
- You care.
- Their peace of mind is a priority.

Implement this strategy by alternating which team member will take after-hours or Saturday shift to create shared responsibility. In reality, most advisors receive very few calls during those expanded hours. However, while few clients may call, EVERY client has received the message of attentiveness and care. And there is a second benefit: team members get an opportunity to catch up on administrative work or market research.



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DWS Distributors, Inc.

222 South Riverside Plaza Chicago, IL 60606-5808

www.dws.com service@dws.com

Tel (800) 621-1148

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