Advocate Service Matrix Explained

LIONSHARE

Call Rotation

- A regularly scheduled, outbound call, used to check in with clients in a consistent and proactive manner.
- Call rotations are typically scheduled in 90-day, 180-day or 360-day intervals.
- Implementation of the call rotation will further demonstrate your value and build trust.

LionShare News to Know

- Weekly communication from money managers on market direction and outlook.
- A weekly call to hear directly from the featured manager to aid in communicating points clearly with clients.
- Regularly scheduled emails sent directly to your clients. Regal marketing can automate the process for a small fee.
- Weekly newsletter e-mailed to clients.

Review Meetings

- A regularly scheduled, in-person client meeting, with a defined agenda.
- Review meetings are typically scheduled in 3-month, 6-month, or 12-month intervals, based on client segmentation.
- During the meeting, review financial and business matters, and reinforce key messaging.
- Review meetings with clients held regularly underscore the value you provide.

Random Acts of Kindness

- A procedure designed for you to demonstrate a random act of kindness with an appropriate gift, to deepen the client relationship. Branded “swag”.
- Recognition of your client’s important life events demonstrates that you are paying attention.
- This is a high impact activity to enhance trust and build depth into relationships.

Special Event

- An exclusive event held to recognize the continued trust, loyalty and confidence of your best clients. Choose any type of event that you would enjoy hosting or attending with your best clients. Examples: a sporting event, dinner cruise, symphony, wine tasting, economic highlights, social security, etc..
- Special events may be catered to shared interests among clients. Use information in CRM notes and Fact Finder notes to find commonalities among top clients.
- The intent is to provide a shared experience that will be memorable.

Thanksgiving Card

- A quality card sent with an inspiring message to your AAA and AA clients. Ensure the message is handwritten and the envelope is hand-addressed.
    - For example: "I wanted to wish you and your family a happy and safe Thanksgiving. Also, I want to say thanks for a great relationship. Warmest regards, Advisor."
- Other classifications receiving a Thanksgiving Card can receive a shortened message. Ensure the message is handwritten and the envelope is hand-addressed.
    - For example: "Happy Thanksgiving. Best regards, Advisor."
- By using the Thanksgiving Card, your message will arrive ahead of the pending Holiday season.
- The winter holiday season is a very cluttered time to deliver a personal message.

Birthday Call

- An excellent opportunity to recognize a valued client on a special day.
- This high-impact, time-leveraged activity lets a client know that you are paying attention to them beyond just their business dealings with you.
- Excellent opportunity to make routine service inquires, RMDs, Beneficiary Updates, etc.
- We can help to script a message for all schedule formatted calls.

Wallet Share Campaign

- DRIP Marketing postcard and e-mail campaign to increase "wallet share"in a client household. (Rollovers, Life Insurance, DAFs, College Accounts, etc.) Twice a year campaign e-mail/postcard.

Service Campaign

- A DRIP Marketing campaign that focuses on being proactive with service work: RMDs, Risk Tolerance Changes, Beneficiary Changes, etc. Twice a year postcard and e-mail campaigns.