Tips for Success

To help you really make a difference to your clients during this campaign, we've brought together some things you may want to do before you begin

1. Share details of this campaign throughout the whole firm and encourage all to use the #LeaveNoBusinessBehind hashtag or logo on your social media posts and email footers. Show your clients how much you care.

2. Identify who in your firm will speak to each client - maybe each portfolio-owning director/partner or maybe managers too? Ensure you have enough resource to achieve the aim of speaking to every single client within your intended timescale.

3. Get organised. Schedule in your calls - are you going to contact a few every day or are you going to put aside full days to get this job done?

4. Decide how you will track which clients you have spoken to and whether there is any follow-up action - can it be monitored on an existing CRM system or simply on excel?

5. Understand how you will handle fees for preparing projections and/or raising finance and which software you intend to use. Check out our videos and supporting resources for more information and ideas.

6. Secure some marketing support to assist you with social media, email announcements etc. if necessary.

Good luck! Don't forget to sign up for our community webinars where you get further tips & ask us anything!