Using Email to Keep in Touch with Clients

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Build a service offering for your lower net worth clients that still keeps you in touch with them and fulfils your requirements of offering reviews.

We are currently building a system that will assist us to stay in touch with our clients that is high touch and low cost.

We want to keep in touch with clients via email using software that personalises emails to the clients and includes information you want your clients to know about.

The clients will be segmented based on Age or Generation, so we will have different offerings for different generations.

For example, for our pre-retiree clients we will let them know when we are having retirement seminars and what the topics will be, we will send them emails re changes to Pension laws and legislation.

For our Generation X'ers and Y's, we send them information on Wealth Accumulation ideas, Home loan offerings and gearing strategies to assist in building wealth.

Plus, we are always offering reviews on a yearly basis.

To allow all of this to occur, we need to be constantly collecting email addresses from all of our clients/prospects and with the right technology you can keep in touch on a regular basis.