



More Practical Tips for Times of Turmoil

Building on our article [Practical Tips for Turmoil](#), hopefully by now you've reached out to all your clients using some of our [Talking Points for Client Conversations](#).

Tip #1: Continue to contact your clients! Until we see evidence of a decline in coronavirus cases, we're likely to see ongoing market volatility. So, we continue to recommend contacting clients – by phone, videoconferencing and emails – to see how they are doing, offer support and provide guidance from your perspective.

Tip #2: Remind your clients to let you know about friends or family members who may be worried and are not hearing from their own advisors. Even with social distancing, as clients check in with loved ones and others via phone, email or social media, they may learn of people who need your help. Remind them to call you if that happens.

Tip #3: Reach out to your own prospective clients and contacts. Perhaps they have not heard from their own advisor or maybe they thought they could manage their own investments. Let them know that as you were contacting your clients, you thought of them and wanted to make sure they're okay. This may or may not lead to a new opportunity, but you are demonstrating your concern.

Tip #4: Plan for the opportunities that lie ahead. Make some time to begin planning for what comes next. Investing in yourself and your business now can help you be better prepared for when working from home or social distancing is no longer needed. And it can help increase your confidence to have a plan for growing your business during the recovery.

- Organize your list of prospective clients and contacts in your contact management system. Add "tags" for special interests.
- Refine or redefine your niche or areas of specialization.
- Clarify what differentiates you from other advisors in your area.
- Update your website and LinkedIn profile with fresh messaging.
- Review your social media presence (LinkedIn, Twitter and Facebook) for how you might develop a personalized approach to items you post.
- If you've been emailing updates to your clients through the current crisis, consider how you might continue to use email effectively going forward.
- If you've found that webinars or recorded videos build strong connections with clients and prospective clients, consider how you might employ that technology going forward.
- Look for opportunities to share your knowledge and experience with organizations in your area or host your own event by late summer or fall.

As you formulate your plans for the months ahead, you can begin to share what you are doing with clients and others. Pretty soon, your confidence in your future will encourage your clients to have more confidence in theirs.