ADVOCATE SERVICE

How to Automate Your Service Matrix

This process will outline the steps required to automate the **Advocate Service Matrix**.

Automating your Advocate Service Matrix is essential. This will ensure a consistent experience and also serve as an accountability tool, outlining whom will be responsible, with implementing the various activities.

The first step is to assign a team member who will be accountable for keeping the team up to date regarding implementation and ongoing monitoring of the Advocate Service Matrix. It would be helpful for this person to be knowledgeable regarding the functionality of your CRM.

Call Rotation

The Call Rotation process is a brief scheduled, outbound telephone call. The Advisor or assistant – if it is a B group client - calls the client and has a conversation around topics which can include, family, occupation and recreation. The intent of the call, is to focus on the relationship not wealth management. To create a Call Rotation process follow these steps:

Print a list of clients in each of the AAA, AA, A, AF and B groups.

Beginning with your AAA clients, enter a service activity (outward bound call) in your CRM for each client following these steps:

1. Select the client record.
2. Using the calendar or appointment scheduling feature, go to the present date plus one month. (For example, if today were June 1, then use July 1)
3. Schedule an event in the calendar titled, Call Rotation for 6:00 am.
   - The 6:00 am time-slot is used as a placeholder on the calendar. The phone call can be made at any time during that day.
4. This service activity will repeat at different intervals for different client groups. Use the recurring feature if available or set a manual reminder within the Call Rotation to 'move activity forward' once completed.

Example:
- AAA & AA client groups – Event recurs every 3 months.
- A client group – Event recurs every 6 months.
- AF & B client groups – Event recurs every 12 months.

5. Assign the Call Rotation to the applicable team member's calendar:
- Advisor for AAA, AA and A clients
- Assistant for AF and B clients

6. Repeat the process for the next client record. Work through the entire AAA client list before starting the AA client list. To ensure that the Advisor has a manageable number of activities each day, use the date of the last scheduled call rotation plus two days. For example, the call scheduled for the first client was made for July 1, next call would be, July 3.
- If an activity falls on a weekend day, schedule the call for the following Monday.
- If you run out of days in the year, restart at the present date plus one month.

Note: You may want to schedule this service activity as the "FORM Call" or "Relationship Call" to reinforce the personal aspect of this service activity. It is not intended to be directly related to business you have with the client.

Magazines of Interest

The Magazines of Interest process schedules the sending of interesting magazines to your best clients. The magazine chosen should reflect the interests of the client as revealed in your FORM data. This task is executed by the assistant.

1. Magazines of Interest are a deliverable for your AAA & AA Clients
2. Use your Contact Management System to automate the Magazine of Interest reminders
3. Designate a person on the team who will be accountable for implementation

You may also wish to have your office subscribe to magazines for your waiting area, again based on FORM data that reflects any shared interests among clients.

Articles of Interest

The Articles of Interest process staggers the sending of links to relevant and interesting articles to your best clients. These should be scheduled every 6 months and also used on an as needed basis. To learn more about how to create an inventory, refer to the How to Create an article of Interest Inventory resource. This task is executed by the assistant.

To create the Article of Interest process beginning two-months out, follow these steps:
1. Print a list of all the clients in each of the AAA & AA groups. An alphabetical list by last name works best.
2. Beginning with your AAA clients, enter a service activity (Next Action) in your CRM for each client following these steps:
- Select the client record.
- Using the calendar or appointment scheduling feature, go to the present date plus two months. For example, if today were June 1, then use August 1.
- Schedule an event in the calendar named Article of Interest for 6:00 am. The 6:00 am timeslot is used as a placeholder on the calendar. The activity can be completed at any time during that day.

3. Repeat the process for the next client record. Work through the entire AAA client list before starting the AA client list. Use the date of the last scheduled article of interest plus two days.
- For example, the next action was scheduled for the first client was made for August 1, use August 3 now.
- If an activity falls on a weekend day, schedule the activity for the following Monday.
- If you run out of days in the year, restart at the present date plus two months.

Moments of Truth

Moments of Truth do not happen as regularly scheduled events only on an as-needed basis. Refer to the Common Moments of Truth resource for a list of types of things you can expect.

Review Meetings

The Review Meeting process creates the list of clients that the assistant needs to call to schedule the regular Review Meeting. Reference your Advocate Service Matrix for your frequency. To create the Review Meeting process beginning three-months out, follow these steps:

1. Print a list of all the clients in each of the AAA, AA, A, AF and B groups. An alphabetical list by last name works best.
2. Beginning with your AAA clients, enter a service activity (outbound call) in your CRM for each client following these steps:
- Select the client record.
- Using the calendar or appointment scheduling feature, go to the present date plus three months. For example, if today were June 1, then use September 1.
- Schedule an event in the calendar named Schedule Review Meeting for 6:00 am. The 6:00 am time-slot is used as a placeholder on the calendar. The phone call to arrange the meeting can be made at any time during that day.

3. The event will repeat at different intervals for the different client groups:
- AAA, AA & A client groups – Event recurs every 6 months.
- AF & B client groups – Event recurs every 12 months.
- C & D client groups can be conducted by telephone or mail dependent on your compliance department requirements

4. Assign the Schedule Review Meeting task to the assistant for all client groups.
5. Repeat the process for the next client record. Work through the entire AAA client list before starting the AA client list.
- Use the date of the last Schedule Review Meeting plus two days. For example, the next action was scheduled for the first client was made for September 1, use September 3 now.
- If an activity falls on a weekend day, schedule the call for the following Monday.
- If you run out of days in the year, restart at the present date plus three months.

Annual Anchor

To create the Annual Anchor process, follow these steps:

The Annual Anchor process takes 55 business days to complete one cycle. This task cycle is set up and managed by the assistant. Refer to the Annual Anchor Samples resource for ideas.

1. Select the date you want the Annual Anchor to arrive at your client's home. This date will drive the entire process. Example, date is Monday, December 20.
2. Create an activity on the assistant's calendar called, "Annual Anchor Arriving."
- Schedule this as an annual recurring event.

3. Back up 5 business days from Step #1. Example, date is Monday, December 13.
- Create an activity on the assistant's calendar called, "Annual Anchor Sent Out."
- The Annual Anchor gift and the corresponding personalized card are sent to AAA and AA clients on this date.
- Schedule this as an annual recurring event.

4. Back up 10 business days from Step #2. Example, date is Monday, November 29.
- Create an activity on the assistant's calendar called, "Personalize Cards-Annual Anchor."
- Use the next 10 days to personalize each client card.
- Schedule this as an annual recurring event.

5. Back up 30 business days from Step #3. Example, date is Monday, October 11.
- Create an activity on the assistant's calendar called, "Order Annual Anchor and Cards."
- Schedule this as an annual recurring event.

6. Back up 10 business days from Step #4. Example, date is Monday, September 27.
- Schedule a meeting on everyone's calendar called, "Annual Anchor - Team Meeting."
- Schedule this as an annual recurring event.
- The agenda for the meeting is to confirm the Annual Anchor for the year.

Birthday Calls

To create the Birthday Call process, follow these steps:
Print a list of all AAA clients. Enter a service activity (outward bound call) in your CRM for each client following these steps:

- Select the client record.
- Create an activity on the assistant's calendar on the day of the client's birthday called "Birthday Call".
- Schedule this as an annual recurring event.

Note: If you are sending Birthday Cards in addition to or instead of the Birthday Call, make sure you have a process in place using your CRM to trigger reminders appropriately so that cards are mailed with enough time to travel through the postal system.

Thanksgiving Cards

To create the Thanksgiving Card process, follow these steps:

The Thanksgiving Card process takes 55 business days to complete one cycle. This task cycle is set up and managed by the assistant.

1. Select the date you want the Thanksgiving Card to arrive at your client's home. This date will drive the entire process. Example, date is Tuesday, November 23.
   - Create an activity on the assistant's calendar called, "Thanksgiving Card Arriving."
   - Schedule this as an annual recurring event.

2. Back up 5 business days from Step #1. Example, date is Tuesday, November 16.
   - Create an activity on the assistant's calendar called, "Thanksgiving Card Sent Out."
   - The Thanksgiving Cards are mailed to AAA, AA, A, and B clients on this date.
   - Schedule this as an annual recurring event.

2. Back up 10 business days from Step #2. Example, date is Tuesday, November 2.
   - Create an activity on the assistant's calendar called, "Personalize Cards-Thanksgiving."
   - Use the next 10 days to personalize each client card.
   - Schedule this as an annual recurring event.

3. Back up 30 business days from Step #3. Example, date is Tuesday, September 21.
   - Create an activity on the assistant's calendar called, "Order Thanksgiving Cards."
   - Schedule this as an annual recurring event.

4. Back up 10 business days from Step #4. Example, date is Tuesday, September 7.
   - Schedule a meeting on everyone's calendar called, "Choose Thanksgiving Card - Team Meeting."
   - Schedule this as an annual recurring event.
   - The agenda for the meeting is to decide on a design and vendor for the Thanksgiving Card and the message inside.