

Lasting client relationships in 10 steps

In his book titled, *The 10-Step Process of Professional Client Engagement*, Anton Swanepoel, author, trainer, consultant and industry expert, examines in detail what it takes to engage clients – and maintain them – in the competitive world of financial planning.

At a Glacier webinar earlier this year, Anton demonstrated what it takes to get and keep clients in his blueprint for client engagement. It's a process, he says, not a magic formula. While he provides the simple 10-step how-to, engaging clients is a long, hands-on process that requires patience and hard work. And trust. According to Anton, as in our personal lives, trust, honesty and integrity form the bedrock of lasting client relationships.

Excellence from the start

From prospecting to client review, every step of the process must be excellent, says Anton. Do a great job at the first engagement, and referrals will follow. And don't underestimate the importance of your mindset, which must be one of trust and integrity. If you won't give your money to someone you don't trust, why should your client?

Clear communication is also key. This leads to mutual understanding and agreement, and there is power in both. Create realistic expectations, says Anton. In fact, under-promise and over-deliver.

Also, ongoing reviews go a long way to helping you keep in touch with your client, building relationships with them and ensuring possible ongoing revenue.

Excellence must also extend to the administrative processes and CRM you implement.

Streamlined, standardised processes go a long way to ensuring good record-keeping and a CRM system ultimately helps you build a client base where your client feels catered to and nurtured.

Look after your clients, says Anton. If you don't, your competitors will.

Glacier and the 10 steps

Over time, we have covered Anton's 10 Steps in the *Glacier Weekly* and these can be viewed on the links below:

Glacier Weekly, 27 May 2021, [Steps 1 - 3](#)

Glacier Weekly, 10 June 2021, [Steps 4 - 6](#)

Glacier Weekly, 8 July 2021, [Steps 7 - 10](#)

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Glacier Financial Solutions (Pty) Ltd.

A member of the Sanlam Group

Private Bag X5 | Tyger Valley 7536 | Email client.services@glacier.co.za | Tel +27 21 917 9002 / 0860 452 364 | Fax +27 21 947 9210 | Web www.glacier.co.za | Reg No 1999/025360/07

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Private Bag X8 | Tyger Valley 7536 | Tel +27 21 950 2600 | Fax +27 21 950 2126 | Web www.smmi.com *| Reg No 2002/030939/07
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Sanlam Life Insurance Ltd. | Email life@sanlam.co.za | Tel + 27 21 916 5000 / 0860 726 526 | Fax +27 21 947 9440

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