



Go Old School to Stand Out in the Digital World

Building relationships hasn't changed over the years. The same tools that connected people generations ago still work today. To stand out in a digital world, sometimes you need an old-school approach. Using these tips can help you form deeper bonds and stronger business relationships with your clients.



Meet face to face

Visit with your clients regularly to understand their current challenges. Personal visits foster stronger connections.



Pick up the phone

Phone calls are becoming rare in a world of text messages, emails and social media. Stand out by making a personal call. Hearing your voice helps build a connection.



Learn about your clients

Show you care by remembering personal details like anniversaries, birthdays and family stories. The more you know about your clients, the better you can recommend products.



Take clients to lunch

Sharing a meal is a great way to have meaningful conversations and build bonds.



Pick up pen and paper

Handwritten notes are rare today. Clients appreciate the personal touch and the time you take to write a letter.

Memorize these questions and use them to learn about your clients' financial needs. This will help you recommend the best product for them.

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