

Clark Capital

Best Ideas Series:

Socially Distanced,
Thoughtfully Connected.

Ideas to Help You Grow
and Retain Your Business



Bringing You Our Best Ideas

The Importance of Staying Connected



It's undeniably clear that the power of communication and connection are important now more than ever.

According to a study by Invesco* conducted in April 2020, two thirds of investors surveyed had not heard from their financial advisor since the beginning of the pandemic.

Providing consistent communication during challenging markets can present a growth opportunity for advisors. The same study found that 82% of investors who *did* hear from their financial advisor during the crisis would be happy to refer them to a friend or family member.

2/3

of investors had not heard from their advisor one month after the start of the pandemic.

82%

of investors who received consistent communication from their advisor would refer them to a friend or family member.

We're excited to share some of the best ideas from advisors across country who are successfully staying connected with their clients during these challenging times.

*Source: Barron's The Way Forward—The Catalytic Conversation Webcast

Stay Plugged in to Your Clients



With more people working from home, many of us are faced with a new challenge: burnout. According to a survey by employment platform Monster*, 69% of employees are experiencing burnout symptoms while working from home.

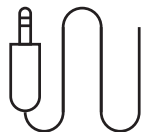
Try incorporating some of these tools to help you **create a more efficient workspace, so you can focus on staying connected to your clients.**



Too much screen time can put a strain on your eyes. Try a pair of blue light glasses. We love the stylish pairs from [Felix Gray](#).



Miss your standing desk at the office? [This converter](#) can turn any desk or tabletop into a standing desk.



Something as simple as [cord holders](#) or [iPad stands](#) can make accessing your gadgets a breeze.



If you're ready to stand, get [a supportive mat](#) to help fight fatigue. This mat is contemporary and comfortable!

*Source: <https://www.cnbc.com/2020/07/28/remote-work-burnout-is-growing-as-coronavirus-pandemic-stretches-on.html>

Host Socially Distanced Or Virtual Events



Events are a great way to let your personality shine with clients and prospects. Throughout the pandemic, advisors have been finding creative ways to connect with their clients in a socially distanced or virtual way.

Take a look at some of our favorite ideas:



Golf Outing and Socially Distanced Happy Hour

Host a golf outing followed by a socially distanced happy hour. You can even take it one step further and have your clients "invite a friend," to help connect you with potential prospects.



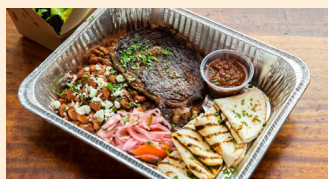
Drive-In Movie Night

Make it a family-friendly affair with a drive-in movie. No drive-ins near you? No problem! You can rent your own projector and inflatable movie screen from companies like [FunFlicks](#)



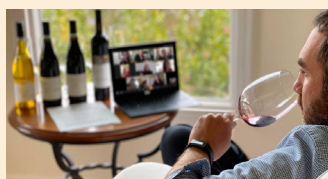
Themed Food Truck Events

Rent a local food truck and try out a fun theme. One advisor hosted a taco food truck and cocktails with the theme of "Tacos and Titos!" Or, try an outdoor bonfire with s'mores for a family-friendly theme.



Support Small Businesses with Takeout Dinners

Purchase your clients' families takeout dinners from a local restaurant and offer to meet socially distanced outside during pickup. It's a great way to connect to your clients while supporting small businesses.



Virtual Wine Tastings

Companies like [Bottles Nation](#) or even smaller wineries such as [Bouchaine Vineyards](#) make virtual wine tastings easy, fun and convenient.

Streamline Communications for Better Meetings



Most advisors segment their business by AUM. Try taking it one step further by **segmenting your clients by touch point**. One way to do this is to send a survey to your clients. You might be surprised by their answers and find that many clients prefer virtual meetings to accommodate their busy lifestyles.

Below is a sample survey you can use with your clients to help get you started.

SAMPLE SURVEY

Question 1: Determine Meeting Frequency

How often would you like to engage with us formally per year? A formal engagement is a scheduled meeting not related to a proposal review, income plan or client review.

Question 2: Select Preferred Meeting Type

Do you prefer remote/virtual meetings, or in-person meetings? If a combination, please provide some details (i.e. what type of engagements would you prefer in person compared to remote?)

Question 3: Measure Comfort Levels with Technology

On a scale of 1-10, with 1 being the lowest comfortability and 10 being the highest comfortability, how comfortable are you with the technology associated with remote meetings (Zoom/GoTo Meeting/WebEx/Skype)?

- a. If you scored yourself less than 5 on this scale, are you interested in learning more from us on remote meeting technology?

Question 4: Expand the Client Relationship

Can you share with us anything specific that will help us serve and support our relationship moving forward?

Want to create your own survey?
[Survey monkey](#) is a free and easy online survey creator

Meeting Virtually?

Don't let the quality of your video impact the important message you bring to your clients. We partnered with a professional videographer and are sharing his favorite **5 tips for showing up great on camera:**



Adjust Your Angles

Adjust the lens on your device to sit right at your line of vision. When talking to clients, look directly into the lens as much as possible to simulate the feeling of in-person conversation.

Play Around with Lighting

Lighting should be soft and even. To help, you can purchase an inexpensive [ring light](#) or [camera attachment](#) to help even out the lighting in your room.

Be Intentional With Your Backdrop

Make sure your space is tidy and think about adding a personal touch—displaying family photos or your favorite books can help you connect with your clients.

Manage Unwanted Noises

Most devices today do a good job of picking up sound. If your environment is subject to unwanted background noise, practice video etiquette by muting your line when you're not speaking.

Dress to Impress

Choose something you would normally wear when meeting with your clients and avoid wearing an outfit that blends into your background. Stripes and complex patterns can also be distracting on video, so try to wear solid colors when possible.

Interested in Learning More?

These are only a few of the "best ideas" we've heard from advisors across the country—your Investment Consultant can share even more ideas and events that are local to your area.

Please reach out and let us know how we can help you stay connected with your clients during this challenging time.

[Contact Your Local Investment Consultant](#)

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