

# Client Engagement Roadmap

Do great work for your clients and make sure they know about it

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Despite your best efforts, clients sometimes struggle to remember your valuable guidance. No matter how strong the message, clients can be easily distracted. Some are inclined to make emotional, sometimes rash, decisions based upon what is happening at the moment, losing sight of where they have been or where it is they desire to go.

A solution is to build your service around the Client Engagement Roadmap. The Client Engagement Roadmap positions you as the coordinator of your clients' complex financial affairs. Helping your clients articulate and then document their goals and objectives is a critical function.

## Roadmap results

Framing your service with the Roadmap can have several benefits. Advisers have reported that the Roadmap has become a key deliverable for quarterly reviews. By making it the driver for client meetings, emphasis is placed on the process of coordinating all of the activity that is required to help clients work toward financial security rather than on short-term investment performance.

Effective implementation of the Client Engagement Roadmap will:

- Visibly illustrate the value you provide to clients.
- Provide structure for ongoing communication with your clients.
- Strengthen client reviews with a thorough examination of their total financial picture.
- Spur ongoing discussion about client financial goals and set expectations about ongoing interaction between you and your clients.
- Pinpoint planning areas that may require additional resources such as estate and tax planning.
- Help you maintain focus on each client and their unique goals and circumstances.
- Generate new business leads as clients show their Roadmap to friends, family or colleagues

## Using the Roadmap creation toolkit


Russell has built a web-based toolkit to simplify the production of your client roadmaps. You can start creating roadmaps for your clients straight away by registering at [www.helpingadvisers.co.uk](http://www.helpingadvisers.co.uk).

The basic level of access will allow you to create unlimited roadmaps for your clients, and save a default roadmap to reflect your most common meeting agenda.

Enhanced access allows you to save created roadmaps for each of your clients and these can be easily updated as their needs change throughout their life. You will also be able to upload your own logo to further personalise your roadmaps.

For help and support with the roadmap toolkit, please contact your Russell representative or call +44 207 024 6601.

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## Tips for creating successful Roadmaps

### 1. A focus on fundamental financial planning topics

We recommend each meeting includes the following planning topics:

- **Goals review** - review your client's long-term financial goals as well as any issues that they have emphasised.
- **Roadmap review** - highlight and draw attention to the steps in the planning process.
- **Investment review** - an opportunity to review the investment solutions and broader financial planning considerations you have implemented for your client.
- **An Education topic** - Consider adding an education topic that relates directly to the client's needs. The educational component should coincide with the upcoming activities in the following meetings shown on the Roadmap.

### 2. Prioritisation and personalisation of planning topics

Prioritise the issues on the basis of the insights you gained in the fact-finding process, and personalise the Roadmap, including the names of your clients, along with the names of stakeholders such as their children and/or grandchildren.

### 3. Be strict in implementation

Once you have your initial Roadmap completed for a client, you can update it as your client's circumstances change. As each quarter progresses, you can file the Roadmap, so that at all times you have a documented history of your client's goals and planning issues.

If items are not completed they must be advanced to the next quarter in order to address all of the client's needs. Avoid the temptation to over commit yourself. With rigorous implementation and follow-up on the Roadmap milestones, you will demonstrate tangible evidence of the value you provide.

### 4. Roadmap review frequency

The Roadmap toolkit is set up for quarterly client interaction by default. This is due to its design for higher-net-worth clients. It is also designed to help document work you do for clients that is often hidden behind the scenes. For those advisers who do not meet with a client every quarter, there are still activities that take place without the client's involvement. For example, quarterly statements, performance reporting, portfolio rebalancing and much more often take place without a formal quarterly review. By populating the Roadmap with all of these activities, the adviser can highlight the value of the ongoing work being done.

### 5. Practice

Construct a Roadmap for yourself, beginning with the first quarter, complete the Roadmap as if you were the client. You may wish to deliver the Roadmap first to selected secondary focus clients, learning how to most effectively implement it before moving on to your primary focus clients. The better you get, the better the justification of your value to clients.

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