How to Create Your Client Profiles

The Client Profile best practice involves gathering, storing and using information about your high value clients regarding their family, occupation, recreation and interests to solidify and competitor-proof the relationship with them.

How to Create the Client Profile

Implementation for this best practice can be as simple as this:

- Print a hard copy of the Client Profile for every A level client (AAA, AA, A) you have and write the name of each client at the top.
    - For each existing A level client (AAA, AA, A) you need to complete as much as possible on the Client Profile.
    - Have everyone on the team review the Client Profile and add to it accordingly.
    - Next, you may want to review client files for important client details captured during previous meetings and/or calls.
- Alternately, you can complete this online in the Client Profile feature of your CRM. Choose the process that will work best for you.

If you are not able to satisfactorily complete a thorough Client Profile for your existing best clients, you need to begin gathering this information as soon as possible. Gather information about lifestyle and interests during your review meetings, through your call rotations, events, and via your staff (who are often a great resource for information about your clients.)

Note: We NEVER recommend using a survey to collect this type of information because most of your high value clients will expect you to know this about them already. For your new clients, this information can easily be gathered during the Client Onboarding process (more about this later in the program).

Set a Timeframe to Have Them Initiated & Monitor Your Progress

Decide on a reasonable deadline for having the Client Profile initiated for each of your A level clients. The timeframe you've chosen and the number of clients you have in your A level groups will determine how many you need to complete each week.

- You should have no trouble completing at least one or two Client Profiles per week without adversely affecting your capacity.

If you have an Assistant, add Client Profiles to your weekly Team Meeting Agenda to keep this new project top of mind for everyone. With a heightened sense of awareness, you and your team are more likely to continue to practice collecting and using this important information. The Client Profile coordinator will address this item on the Agenda.

Use Your Contact Management System

As you complete the Client Profile for each client, log their information into your contact management system. This will ensure everyone can easily store, view, share and utilize the important information gathered. Do NOT bury this information in meeting notes and client history because it will not be used. This information needs to be in an easy to access location on the contact management system.

If you do not have a CRM, we will provide you with some alternatives for storing this information.

Don't just Collect It, Use It

Use the Client Profile information to ensure communication with your clients is purposeful and meaningful to them. This includes several elements of the Client Service Model we will be creating next, and we will talk about in great detail.

For now, everyone who services your clients' needs to be attentive, continuing to gather and communicate new Client Profile information about all your high value clients. This means every time a client interaction takes place (Review Meetings, Telephone Calls, Mingling at Events, etc.):

- You use the existing information to establish rapport
- You actively and genuinely gather additional information.

Ultimately, you will quickly observe how using the Client Profile is an important building block in establishing enduring relationships with your high value clients.