

Implementing a Client Crisis Care Program

INTRODUCTION

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Imagine any moment in your life where something happened that caused you stress and you had to ask someone else for help because you didn't know how to handle it. Maybe a pipe in your house burst or maybe your automobile broke down in the middle of nowhere. Think of the stress and emotion a non-life-threatening incident caused you.

Now, imagine what that moment looks like for your client when they face a crisis or a loved one's death. How valuable would it be for them to have information, instructions or documents to help them get through it? Now, imagine the feeling they will have when you are the one providing the service. The importance of this type of program is that you can provide peace of mind to a client when that moment arises.

Implementing a Client Crisis Care Program

Client Crisis Care Programs, sometimes called maintenance programs, are a valuable client service offering that can also provide a significant amount of recurring revenue. As valuable as estate planning may be, most clients will have a crisis before they realize the passing of a loved one. Having peace of mind that their most trusted resource is right there when they need it or has provided them with everything they need in that moment, may be the most valuable service you can provide.

Of course, implementing a Client Crisis Care Program can be challenging. Not only do you have to develop a program with value that clients will pay for, but you must execute the program for it to be effective. We have compiled some best practices from our users to offer some guidance into successful Client Crisis Care Programs. Here are some of the items included in successful Client Crisis Care Programs:

[Instant access to life's most important data, information and documents](#)

More than DocuBank or Box--a document portal that clients can make sense of. Imagine someone handing you a stack of papers in a crisis and you having to figure out what is in them. It's great to have your documents in order but you still must make sense of them. How about a portal that plucked out all the valuable information? How valuable would that be in a crisis? *It isn't about providing storage, it is about providing understanding.* Helping your clients organize their life and make sense of it is a valuable service.

“*Making sense of the information is the most important part of accessing documents*”

Legacy planning

Many estate plans do not include legacy planning, so offering legacy planning can be extremely valuable. We don't mean charitable giving; we mean planning for the way you want to be remembered. Maybe it is that last message or the stories you created with your family. Preserving memories through photos and videos that have been made over a lifetime is priceless. Using technology to scale this is even more effective. Technology doesn't get wet, lost, destroyed or burned. It is preserved forever, from generation to generation. This can be one of the most effective offerings of a client care program.

Illustrations and summaries

A client's typical takeaway from the estate planning process is a binder of documents. How about elaborate summaries and illustrations to accompany those documents? Using technology to compile this information in a nice readable format would enhance a client's takeaway beyond documents. These summaries are useful for clients in many ways and can be updated in an instant. By parlaying this with state-of-the-art illustrations, you can separate your client care program from those of other professionals and strengthen your value proposition.

Online annual reviews each year

Being available all the time can be difficult. Technology provides you with a way to be available all the time...virtually. Clients like being able to speak to a human in a moment of need. With technology, not only will you be available, but you will have access to the information you need to provide the right answers. The value you provide clients by just being there when they need it and using technology to scale their access to you can be priceless.

Asset tracking

Monitoring financial assets is easy and there are many options. Estate planning provides for monitoring tangible and digital assets. As clients increase their wealth, they accumulate tangible assets that need to be monitored. This includes business valuation for succession planning. As society transitions into the digital age, intellectual property, domain names, crypto-currencies, and reward points are types of digital assets that hold significant value for beneficiaries and tracking them can be provided as part of a maintenance program.

Family planning

Working with the family to plan now and beyond a person's lifetime can be valuable and using technology makes it easier for everyone to come together. Each family member has a different dynamic, but those will all come together upon the passing of a loved one. By planning with the family, you will strengthen relationships for generations. In a busy world, scaling this planning through technology makes the offering easier. Meeting, reviewing information, and access to information can all become part of a client care program.

|| *“By planning with the family, you will strengthen relationships for generations.”*

Intangibles

The intangibles are the items in a client care maintenance program that allow the professional to touch the client from time to time to stay relevant in their mind. Whether it be an electronic birthday wish or an educational webinar, it is important to stay on their mind. From time to time, educational content, client events or just a simple call can go a long way. These little touches, as simple as they seem, will fortify their reasons for participating in the client care program.

What is next?

Determine what you would like to include in your Client Crisis Care Program. Review the suggestions in this paper, review our best practices on charging a client and begin implementation of your program. Construct an information sheet and promote your program to existing and future clients.

In Closing

Client maintenance programs can be a boon to any business that provides professional or legal services to its clients. Not only are they a great way to generate a substantial and reliable base income for your practice, they also enhance and improve the client relationship. A Client Crisis Care Program is one of the most effective business-generating tools in your arsenal. To your benefit, it helps establish a financially viable, stable practice that can thrive during challenging economies. It improves the client relationship and increases your visibility to your clients.

About Yourefolio

Yourefolio is the leader in estate and legacy planning software for professionals. Developed in 2016, and created by financial advisors, estate planning attorneys, Certified Financial Planners® and insurance professionals, it is the first platform of its kind to service all aspects of estate and legacy planning for estate planners, their clients and their beneficiaries. Yourefolio is estate and legacy planning software for the 21st century estate planner.

For More Information about Yourefolio visit

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