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The High-Tech/High-Trust Balance

Making Smart Use of Technology without Losing the Personal Touch

Technology can enhance a strong, trust-based relationship with your clients, but Paul G. Krasnow warns that it's no substitution for face-to-face time. This article lists 11 tips that will help <u>anyone</u> use high-tech tools in a smart and meaningful way.

Technology does a lot but it can't do everything. Sometimes we forget that. We can get so dependent on email and social media that we lose sight of what people really need from us—especially in business. Yes, clients expect to connect with us in various high-tech ways, but they also crave the deep and meaningful connections that can only come from face-to-face (or at least voice-to-voice) connections. It can be tricky to walk the line, says Paul G. Krasnow.

"Too little tech and you'll seem out of touch, too much and you'll lose the personal touch that keeps customers loyal and engaged," says Krasnow, author of *The Success Code: A Guide for Achieving Your Personal Best in Business and Life* (J & K Publishing, ISBN: 978-0-692-99241-8, $24.95).

"As you're trying to find the right balance, just remember this: Your client relationships are built on emotions and trust, so use technology *only* in a way that maintains, enhances, and propels those relationships to the next level."

Krasnow attributes his career journey to his ability to build strong personal relationships. Following early success in the clothing industry, he experienced a devastating bankruptcy that forced him to rebuild his life from scratch. He went on to join Northwestern Mutual Life Insurance Company, where he created an impressive financial portfolio and won multiple "Top Agent" awards. He still serves clients today—and they love him as much now as they ever did.

"Human needs don't change," asserts Krasnow. "Relationships mattered in the days of pencil, paper, and snail mail, and they still matter in the days of Facebook and Skype."

Ideally, you would meet with all of your clients in person, but of course that's not always possible or even practical. Still, Krasnow says you should invest in at least *one* face-to-face meeting with your top clients. Then, use a carefully balanced mix of technology to maintain the relationship. Here are a few of his tips for using tech the right way.

1) **Don't let "faceless" and "voiceless" technology become your primary communication tool**. Nothing can replace the effectiveness of a face-to-face encounter (even if it's by Skype), especially in the early phases of your client relationship. And meaningful phone conversations can be great, too. It's fine to use less powerful tech solutions like email, texting, and e-blasts to stay in close contact with your clients. These can enhance and strengthen a well-established relationship. But they should only be supplemental.

EXERCISE: *What is YOUR primary means of communicating with colleagues and customers (especially)? If it's faceless or voiceless, what can you do to change this approach?*

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2) **Skype important meetings if you can't be there in person**. Ideally, "in person" interactions are best for relationship building—especially with leading clients—but of course they can't always happen. Video conferencing is second best. Make sure you're using this tech tool often. It's a great way to read body language and facial expressions—crucial for building trust and establishing positive and productive relationships.

3) **Pick up the phone regularly**. Many people dislike the phone. Conversations can be long and meandering, and we're all busy. But you must overcome any "phone phobia" you may have. In terms of relationship building (not to mention problem solving), there is no substitute for the give and take that happens voice-to-voice. Schedule actual phone conversations with clients to catch up and find out how they are doing. Keep that human connection alive!

EXERCISE: *How often do YOU pick up the phone with clients? Every day? Once a week? Never? Write down what you could do to phone more often.*

4) **Pay attention to how the client communicates**. That said, never ignore your client's preferences. If a client seems to prefer phone, text, or in-person communication, make a note of it and honor their preferred style while maintaining your own dedication to person-to-person contact. This shows them you care about and respect their preferences. Find a happy balance between the client's style, yours, and the demands of the day.

5) **Match the medium to the message**. This one gets overlooked. If you want to distinguish yourself and have something very important to say, write a letter! If you are trying to book an appointment with a busy person, figure out something complex, or discuss a potentially sensitive issue, pick up the phone. If you only want confirmation of a small piece of information and you've recently spoken with a client, use email or text. Let your instinct be your guide.

6) **Be thoughtful and deliberate with social media**. Your competition is taking advantage of these platforms and so should you. But make sure your online presence is well planned and executed. Facebook or LinkedIn posts should meaningfully connect back to your brand and mission and provide value to clients and other readers. Don't bombard your followers with inane content. This negates your credibility. Post less and make sure your content is good when you do.

EXERCISE: *Is YOUR firm on social media? If not, why not? What could you do to make an online presence beneficial to business?*

7) **Keep websites "young and agile**." Is the website in alignment with business image and mission? Make sure it's as professional and sleek as your own personal appearance when meeting a client for the first time. Successful companies have streamlined, up-to-date websites with modern fonts, colors, and layouts. If it's been a while since it's been changed, it's likely long overdue for a tune-up and a facelift.

8) **Use email to send links to articles you think your client might enjoy**. Trusting relationships thrive on frequent contact. To solidify connection to clients (especially when you haven't talked in a while), send them little links and articles you know they will enjoy. This gesture shows you are thinking about them and know where their interests lie. Just keep these communications in balance. Bombarding clients with superficial links and articles may actually weaken the value of your contact with them and undermine your relationship.

9) **Send e-newsletters to all clients**. This a good way to engage regularly with clients and stay on their minds. Create compelling content that connects with the various lines of services you are currently offering and craft interesting articles for your clients around related topics.

EXERCISE: *Does your company have an e-newsletter? Why or why not? Jot down a few benefits of either having one of your own, or sharing content from a different newsletter.*

10) **Personalize high-tech communication**. Sometimes e-blasts make sense, but whenever possible, include a small personal note at the top that lets the client see they matter to you.

11) **Allow clients to login and access their information**. Whenever possible, empower clients by putting information at their fingertips. This not only saves time for your clients when they need to get a small piece of information, but also goes a long way toward building mutual trust.

Summary

"If you harness the power of technology correctly, it can do wonderful things for your business," concludes Krasnow. "But remember that it is only one tool in your toolbox. Use technology to enhance business, but don't let it overshadow your mission to keep trust-based client relationships at the center of everything you do." ■

Paul G. Krasnow is the author of "The Success Code: A Guide for Achieving Your Personal Best in Business and Life." He is a financial representative at Northwestern Mutual Life Insurance Company, where he has been a top producer for 40 years. Early in his career, Paul suffered a financially devastating bankruptcy with a line of clothing stores he owned, but went on to join Northwestern Mutual, where he has created an impressive financial portfolio and a strong network of clients, many of whom have become lifelong friends. Paul regularly speaks for multiple life associations in the U.S. and has given seminars for law firms and CPA firms in the Southern California area. For more information, visit www.paulgkrasnow.com.

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Making More Connections at Conferences

❖ **Don't wing it**. Study the conference program ahead of time. Also, set aside time to attend not only talks and seminars, but also special events such as meet and greets, and other networking-centered affairs.

❖ **Take advantage of the conference app**. If the conference you're attending has an app, download it. These apps are often full of hidden treasures. For example, some apps list all attendees and their contact information, and allow you to send messages within the system.

❖ **Make appointments ahead of time**. If you know you'd like to meet with fellow attendees, request appointments with them at least two to three weeks before the conference. They are busy too, so it's wise to get on their calendars beforehand.

❖ **Leverage the exhibit hall**. Don't just wander around aimlessly looking for free pens and cup holders. Instead, try to learn new things and make connections that will serve you well long after those free pens have run dry. "Especially for large conferences where there may be hundreds of exhibitors, carefully study the list of exhibitors and map out where the ones you really want to visit are located," Levine instructs.

❖ **Don't eat alone**. At mealtimes, you can usually identify fellow conference participants because they tend to keep their name tags visible. If you see someone eating alone, don't be afraid to ask, *"Do you mind if I join you?"* Most people will invite you to sit down. Don't be tempted to spend your lunch hour reading emails or sending texts when there is networking gold to be had right next to you!

❖ **Be an early (and friendly) bird**. Arrive early to talks and sit down near someone you don't know. This is a great opportunity to network, especially for introverts, because there is a reason to speak with the other person: You are both here to attend the same session. You can whisper, *'It was great to meet you. May I have your business card?'* Now you're done!

❖ **Volunteer at the event.** Few people take advantage of this opportunity. Volunteering at a conference establishes you as a hard worker, allows others to observe your dedication to your craft and the association, gives you access to networking opportunities, and opens doors to leadership and other experiences.

❖ **Be sure to follow up**. If you just go to a conference and do nothing after it, you have (almost) completely wasted your time. "After everyone has returned home, it's up to you to make sure you stay on your new contacts' radars," Levine notes. "Start by composing an email thanking each person for his or her time at the conference, recapping what you talked about, and suggesting a phone or Skype appointment to further develop your partnership." ■

Source: Alaina G. Levine is the author of "Networking for Nerds, Find, Access and Land Hidden Game-Changing Career Opportunities Everywhere" (Wiley, ISBN: 978-1-118-66358-5, $29.95, http://www.alainalevine.com) available at bookstores nationwide, and from major online booksellers.