

Keep It Personal

Personalized promotional materials help you boost your success with clients

by Kelly Biasco

Considering the competitive nature of the financial services industry, it is important to stay on your clients' minds to maintain and increase your business. Creating quality promotional materials — including brochures, customer newsletters and direct mail — can serve as client touch points to help you do just that.

Keep it simple

Quality printed brochures and proposal materials communicate your professionalism and prestige, bolster credibility and reinforce your key messages. These pieces should highlight your strengths and industry knowledge, but also reflect the personality of your business. Consider including staff photos, biographies, non-business affiliations and other personal information to help clients relate to you.

As with all marketing tools, make sure your brochures and other materials address the needs and interests of your particular audience. If your practice targets different age groups, consider developing unique versions of your company brochure. For example, create one version featuring images of young families and another with images of retirees. You may also want to tailor the text within your brochures to reflect the different needs of your particular target audience.

Keep it direct

Direct mail is another quick and relatively inexpensive means for reaching clients and prospects. An important element of any marketing program, direct mail can take many forms, including customer newsletters, business letters, event announcements and brochures.

No matter what direct mail option you select, a quality mailing list targeting the right audience is vital to your success. Exploring your client and prospect files is a great way to build your list.

Keep it current

Particularly when developing customer newsletters, it is best to issue them as frequently as pos-

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These tools and more on www.mdr.org are designed to boost your success.

sible, within the framework of your budget and the information you have to share. For instance, rather than distributing two longer versions of your business newsletter twice a year, it makes better business sense to issue six shorter newsletters to cover timely topics. Again, this promotional tool should include topics that are relevant to your specific target audience. Be sure to create newsletters that feature educational and interesting subjects, such as ways your business is positively impacting your local community, rather than commercial or product-specific issues. By doing so, your clients and prospects will be much more likely to read your future newsletters.

Keep it consistent

Your printed materials do not need to be flashy or expensive, but they need to be consistent and professional. Whether it is a four-page brochure or your everyday letterhead, take the time to review every client touch point to ensure they present a consistent image and message to your clients and prospects. For a polished look, use the same colors, fonts, paper, logo and contact information throughout all of your printed pieces.

Incorporating personalized promotional tools into your business budget is a surefire way to market yourself and all that you offer to clients and prospects. After all, developing a personal connection is the key to success in the financial services industry. **RT**



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