

# MODERN CLIENT ENGAGEMENT:

## COMMUNICATION STRATEGIES FOR TODAY'S ENVIRONMENT

The pandemic opened everyone's eyes to the advantages of using technology to communicate, build relationships, deliver financial advice. The "normal" that results from this seismic shift will see advisors incorporating technology strategically into a hybrid client engagement model that enhances both the client experience and their own productivity. The next top advisors will be hybrid!

### WORKSHOP AGENDA

1. What the data says about the future of advising
2. The unique advantages of hybrid client communication
3. Creating a hybrid client engagement strategy
4. Essential tools and technology for modern communication
5. Packing your Digital Briefcase for success anywhere
6. "Crossover" communication skills that help every meeting
7. How hybrid strategy personalizes client experience

#### YOUR FACILITATOR



Dan Smaida has spent 23 years training advisors all over the world.

### YOU SHOULD ATTEND IF...

- ...you have clients who prefer meeting online...and some who don't
- ...you want to personalize your client experiences
- ...you want to know how top advisors are optimizing their workflow

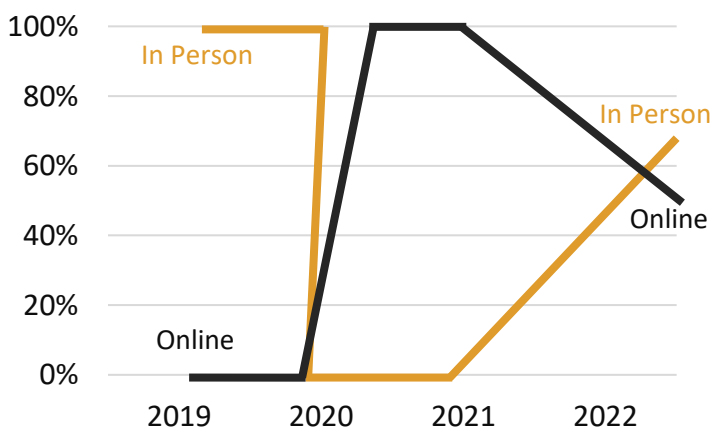
### You'll walk away with



Research shows the modern advisor will use a hybrid communication strategy.

## ARE YOU READY?

### MODERN IS MULTICHANNEL!



### WHAT YOUR PEERS ARE SAYING

- "Really practical advice I can apply to my business right away." - Ron D, financial advisor
- "The Digital Briefcase is an amazing idea!" - Carolyn M, financial planner
- "This session helped me see how we can be more versatile in how we serve clients." - Paul H, practice leader

TO REGISTER:  
VISIT xxxxxxxxxxxxxx  
OR CALL xxxxxx