**Annual Client Appreciation Plan**

As a best practice we recommend having the team give their input on the effectiveness of the prior year’s client appreciation touches and events before making plans for the next year. Creating a 5-star experience requires planning, process and execution.

## In creating an appreciation strategy, many advisors start by determining the kind of experience they want each segment of clients to receive. Here is an example of how you might get started:

## **Example:**

## **Year:** 2020

## **Total Budget:** $25,000

| Client Segment Appreciation Type | A+ | A | B | C | D |
| --- | --- | --- | --- | --- | --- |
| Annual All Client Event | Yes | Yes | Yes | Yes | Yes |
| Small Client Events | 2-3 | 2 | 1 | 0 | None |
| Targeted Client Events | As applicable | As applicable | As applicable | 0 | None |
| Virtual Events and Communities | Yes | Yes | Yes | Yes | Yes |
| Holiday/Annual Gift | 2 | 2 | 1 | None | None |
| Birthdays | Gift ($35 max) + Call | Gift ($35 max) + Call | Card Only | e-Card | e-Card |
| Retirement | Card+Gift ($50 max) or Dinner | Gift ($35 max) | Card Only | None | None |
| Referrals | Card+Gift ($25 max) | Card+Gift ($25 max) | Card Only | Card | Card |
| Thank-you Card | 2 | 1 | 1 | None | None |
| Random Acts of Kindness | 2 | 1 | 1 | None | None |

## **Annual Client Appreciation Plan**

## **Fillable Plan:**

## **Year:**

## **Total Budget:**

| Client Segment Appreciation Type |  |  |  |  |  |
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**Appreciation Calendar**

## Our recommendation is to make a plan for the entire year, but break out the events and activities in each quarter so that you are not overwhelming your team or clients.

## **Example:**

## **Year:** 2020

|  | JAN – MAR | APR – JUNE | JULY – SEPT | OCT – DEC |
| --- | --- | --- | --- | --- |
| Annual / All Client Event |  | Post Tax Season Shred Event |  | Holiday Brunch |
| Small Client Events | TSA Pre-Check Register & Travel Presentation | PP\* Golf Scramble | Summer Culinary Class |  |
| Targeted Client Events | Valentine’s Day Event for Widows & Singles |  | Summer Musical Event | Veteran’s Day Lunch |
| Virtual / Communities | College Planning Webinar |  | Half-Time Webinar | Tax Planning Webinar |
| Other Events | Virtual Food Drive |  | Back to School Drive for Local School |  |
| Client Gifts |  | Spring Cookies |  | Thanksgiving Pie Day |
| Ongoing | * Birthday Gifts
* Birthday Cards
* Weddings and/or Anniversary Gifts
* Client Anniversary
* Referral Gifts and Cards
* Graduations
* Random Acts of Kindness
 |

**Appreciation Calendar**

## **Fillable Plan:**

## **Year:**

|  | JAN – MAR | APR – JUNE | JULY – SEPT | OCT – DEC |
| --- | --- | --- | --- | --- |
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| Ongoing |  |