Brian Puckett is featured in this respected financial services industry publication. Here is the portion of the article that focuses on his exemplary client communications program.

MORNINGSTAR Advisor.com

By: C. Marie Swift / July 1, 2004

Relationship Building Strategies – Part Two

Frequent and meaningful communication helps advisors create loyal fans who talk about them and refer them to others.

In addition to hosting a first-class client appreciation event each year, Brian Puckett, JD, CPA/PFS, principal of Puckett Retirement Advisors in Oklahoma City, recently used a Client Survey to obtain vital information from his clients.

"The survey wasn't fancy but it told us what we needed to know," he says. "We saw some trends across the board – for instance, a number of people thought we could do better with our monthly newsletter and weekly market update."

But it is the individual nuances that stand out in Puckett's mind. Some clients asked for more phone calls and meetings. One suggested they play more golf together. Many said they'd prefer fewer or simpler or different types communications, while a handful said they'd appreciate more detail and technical commentary.

Puckett's clients told him they hated the Lemon Coke his staff had been serving and that the coffee could be improved. Most wrote in what they'd rather drink when they met at the office and at social events, and provided the name of their favorite restaurant. Results were tabulated and individual preferences were incorporated into client profiles.

The clients also ranked his personal qualities and the firm's strengths. "I can tell you the top ten reasons people do business with me," he says. "And while we aren't permitted to use testimonials or client names in our marketing efforts, we were able to summarize in our brochure and put up on our Web site the specific reasons prospective clients should consider working with us – according to our current clients."

Clients also told him they appreciate that he asks how he and his team are doing – and that he pays attention when they tell him. He'll be sharing the survey results and talking about some of the firm's service initiatives at his annual client appreciation event. By focusing on the survey results, he is reinforcing "that it's all about them."

Clearly, Brian Puckett's Client Care Program is also working to attract new clients. "People wrote in the names of friends and family they'd like him to contact. I received a dozen quality referrals," he says.

As he contacts the referrals, Puckett is careful to build rapport by following the 5-Step Communication Cycle outlined in one of my prior articles. He is also cognizant of keeping the referring client posted on the evolving relationship. "I just share what the gist of the conversation was," he says. "Inevitably, it's my clients who move things forward. They want to help and always offer the best ideas."

###