



The Premier Association of
Financial Professionals®

MDRT Minute

Meet, Exceed, WOW!

We are all in show business. Clients want memorable and positive experiences. Done properly, they can have incredible long-term effects on our clients.

Our office motto is “Meet, Exceed, WOW!”. We are careful to understand our clients’ expectations; we strive to exceed them and then go beyond to create the WOW!. Following are a few of the ways that we create the WOW! factor in my organization:

- **Reach out calls.** Each month every member of my staff calls three people who no one in my office has spoken to in the last three months to ask, “How are you doing?” We learn a lot during these calls, and we avoid hearing about significant life events for the first time during an annual client review.
- **Client testimonials.** We keep a scrapbook in the lobby of my office that contains notes, cards, letters, and pictures from clients. We leave it out for all to see and read. It is amazing how many people will look through it while they are waiting.
- **Welcoming visitors.** All clients, vendors and visitors are warmly greeted by a beautifully framed welcome sign that sits on the receptionist desk and is updated each morning. Guests are often greeted with the smell of warm chocolate chips cookies.
- **Birthdays.** One person on my team prepares birthday grams that are personalized with the client’s name, date of birth, and the facts relevant to the date. We all sign them before they are mailed a few days prior to the birthday.
- **Business anniversaries.** Do you remember when you started in the business? Ask any business owner when they started and they can answer you immediately. We recognize hallmark business anniversaries: 5, 10, 15 years, etc.
- **Holiday charitable contribution letters.** We let our clients know that we appreciate their business by making contributions in their honor to various charities. The Thanksgiving letter this year was signed by all 14 of my team members and sent out to more than 600 clients. You can extend the WOW! by asking the carriers you represent to match your contributions.

Client Events

Client events create good will and long-term commitment. I have one full-time person on my team who plans all of these events. We all think she has the best job in the agency!

- **Anniversary celebration.** When I completed 15 years in the business, I decided it was time to thank the people who contributed to my success. I held a New England clambake at my home that was attended by more than 150 people.
- **Educational seminars.** Every six months I hire experts to speak on a topic that is “hot” in the benefits field. We all pay attention to the details. My team is always impeccably dressed in crisp white shirts (I call them “Borislow whites.”), gold name badges, black pants or skirts. Every participant is warmly greeted and given a full package of material of the day’s handouts.
- **Holiday party.** Each year we host a holiday party at my home. We invite clients, friends and people we enjoy ringing in the holiday season with.
- **Novelty items.** We have Borislow Insurance T-shirts, golf shirts, sweatshirts or one of many different pens that we give to clients. The clients actually wear the items and I see the agency name all over the place. I certainly could not pay for better advertising!

Jennifer A. Borislow, CLU, is a 17-year MDRT member with one Court of the Table and seven Top of the Table honors. Borislow is the 2005 Top of the Table Chair and a Diamond Knight of the MDRT Foundation. In her community, she serves on several charitable boards and is involved in many local activities. Her entire 2005 Annual Meeting Presentation is available from the MDRT Power Center (www.mdrtpowercenter.org).