10/26/06 - Newsletter: Tap the Web for the Personal Touch

Now smaller businesses can use web technology to gain a competitive edge over larger rivals, replacing or augmenting traditional forms of sales, service, advertising and contact management.

Automated Touches Work for Financial Advisors: Can the rest of us learn to use the Web for regular contact that is crucial to sales and service? A study of about 14,000 affluent investors by research firm CEG Worldwide indicates that the most satisfied received 28 contacts either in person, by telephone, mail or email in a one-year period. In contrast, very dissatisfied investors received 17 contacts.

This many contacts force brokerages and banks automate the touches. So how can they show clients that they are special? Wachovia's Wealth Management division triggers contacts from a centralized system, employing personalized e-mails. Smith Barney tracks client progress toward specific goals, for example, alerting advisors if part of a client financial plan requires cash flow into college savings. Others create online vaults so clients can remotely store copies of important legal documents for emergency access. Even the mainstay-handwritten notes have succumbed to E-mailed images.

We offer you the opportunity to extend your web presence with:

• E-ListMail for personal automated contact - www.e-listmail.com

• InfoSafeDeposit for personal document storage and distribution - www.infosafedeposit.com

• Many other applications that you can view at the Services section of our web site www.rpdesign.com/services.html

Could your business benefit by selling, servicing and prospecting like the giants? Contact us to discuss.

Best Regards,

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