With all the talk surrounding portals these days, sometimes we can forget about the losing touch with clients.

A discussion around *online versus face time* always makes me recall my days working for the Covey Leadership Group and facilitating “Seven Habits of Highly Effective People” courses. One exercise in particular comes to mind, where the class viewed a sketch of a woman. It never failed that half the class saw an old woman in the sketch while the other half saw a young woman. And both groups only saw one or the other — they could not see the image in a different way. When I brought the two groups together to discuss and explain what they saw in the sketch, the level of surprise among attendees was amazing. Until it was pointed out to them, they could not see the alternative image.

Of course, the purpose behind this activity was to help people understand that there is more than one way to approach and view a situation. Applying this to the profession, many firms cannot see “client service” in a different way. Several practitioners that I talk to view face-to-face client service as an infrequent necessity, relying on technology the majority of the time to communicate and deliver services. I want to challenge this view.

I would suggest that client service is not categorized under one umbrella or the other (online or face time), but rather is defined as the manner in which the client wishes to be served. For some clients, that may be all-digital-all-the-time (though, let’s not kid ourselves … if we don’t ever see the client, we do lose touch). For other clients, it may require more personal attention.

Consider how you can possibly maintain and enhance relationships with clients you never see. To stay attuned and in touch, I suggest a strategy that encompasses a multi-prong approach:

- Create an environment that offers clients 24/7 access to their financial

individuals — from the “all-digitals” to the “needs-more-personal-attention” clients. Ultimately, you want to be able to provide services that support the way the client wishes to be served. It’s a balancing act — one in which neither *online* nor face time reign supreme. But instead, it’s one where they share the stage as equals.

Technology

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