



The Art of WOW: Meeting Your Clients' Unstated Needs

How to create meaningful connections with clients
and prospects by seeking to surprise and delight
them through unexpected actions.



Lindsay Troxell, Senior Director for Janus Henderson Investors Knowledge Labs® explains how today's financial professionals can differentiate themselves by surprising and delighting clients and prospects.

In today's crowded marketplace, it is becoming increasingly difficult for financial professionals to differentiate themselves. Lindsay Troxell, Director, Knowledge Labs® Professional Development, explains how to create meaningful connections with clients and prospects by seeking to surprise and delight them through unexpected actions. Whether you've had your practice for 30 years or are just getting started, perhaps the most important question you can ask yourself is, "Why would someone choose to do business with me?"

Financial products are commoditized. Performance is a constant pursuit over which we have little control. That leaves the client experience as the one thing that can truly differentiate us from our competitors. And in today's crowded marketplace, where consumers increasingly rely on word of mouth to make purchasing decisions, the need to anticipate and exceed clients' expectations is more pressing than ever.

Radar on, Antenna up

Have you ever heard the expression, "Radar on, antenna up"? I first encountered this motto – and saw it in action – during a stay at the Ritz Carlton St. Thomas years ago.

The staff at the resort – and in particular a shuttle driver named Frank – were constantly looking for opportunities to meet the unstated needs of their guests in ways that go beyond the expected or requested to reach a level of delighted. I experienced this firsthand when, after a full day of sightseeing and shopping, I was climbing the steps of the shuttle bus and the toe of my flip-flop caught on the top step and the whole top strap ripped off, rendering the shoe useless.

A mixture of embarrassment and frustration came over me as I explained to the other members of my group that I only packed one pair of flip-flops – and they just happened to be my all-time favorites. (You may be judging my footwear choices but trust me when I say these were some incredibly comfortable flip-flops.)

At this point, there wasn't much else to do but head back to the hotel for some drinks by the pool. As my group disembarked the shuttle, the driver asked if I would like for him to dispose of the flip-flops. Without much thought, I thanked him and took him up on his offer. This was the stage of the client experience where my expectations were unquestionably being met, and perhaps even slightly exceeded.

Upon reaching the bar at the pool, our group was greeted by a gentleman holding a tray laden with five champagne flutes ... and a brand-new pair of flip-flops. They were remarkably similar to the ones I had demolished less an hour ago, and they were exactly my size. Noting that I was the only member of the group who was shoeless, the waiter proffered the shoes to me and said, "Frank the shuttle driven wanted you to know that while these flip-flops can never replace your old ones, they are sturdy and ready to make new memories with you."

The Three Elements of WOW

The story I just related is what I call a "WOW" experience. My unstated need was unexpectedly met, and with an exceptional level of thoughtfulness and style. There are three key elements that make these experiences emotionally compelling: They are designed to surprise and delight, they are timed for relevance, and they are deeply personalized. Frank checked each of those boxes. He did it by keeping his radar on and his antenna up, looking for that perfect moment to meet the unstated need of his guest and gathering information even when I didn't think he was listening.

Did my experience with Frank at the Ritz Carlton surprise and delight? It sure did: We were all shocked and quite delighted!

Was it timed for relevance? Yes, indeed. Frank acted in the moment, making the outcome even more surprising. Had he delivered flip-flops to my room later in the week, there would have been a good chance that I had already replaced them. And even if I hadn't, it wouldn't have had the same impact days later.

Was it deeply personalized? 100%. Frank not only recognized MY immediate need for a new pair of flip-flops, but also the playful nature in which the entire group engaged around the event. Frank didn't just create an experience for me, he created an experience for the entire group.

The Art of WOW ... for Financial Professionals

You're probably thinking, that's a great story ... but how can we, as financial professionals, deliver experiences like this to our clients and prospects?



The answer is *information*: You need to turn your radar on and put your antenna up so you can gather as much information about your clients and prospects as you possibly can.

Hobbies, favorite foods, important dates, life events, interests, values, needs, motivations, beliefs, experiences – any details you can capture that get to the heart of who they are and what they care about most will help you create meaningful, memorable experiences for clients.

Here are some tips on how to do this effectively. First, become a detective: Listen when clients don't think you're listening and ask open-ended questions to get them talking. In short, become extremely curious about who your clients are, what makes them tick, what they appreciate and – most importantly – what makes them *feel appreciated*.

Next, gather all this information in one location. It could be your CRM, a spreadsheet, a client profile template, or whatever works for you and the team. The key here is that you reference this information often and keep it updated so that when the moment strikes, you're able to take your knowledge and turn it into an emotionally engaging experience that leaves your client thinking, "WOW!"

About the Author

[Lindsay Troxell](#) is a Senior Director, and Knowledge Labs® Professional Development Consultant for Janus Henderson Investors. TPFG is proud to include Janus Henderson as a Strategist partner in our Strategy PLUS SDBA Model Marketplace. Connect with Lindsay on [LinkedIn](#).



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