COVID-19 Communication Checklist for Financial Advisors

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As the events of the coronavirus continue to evolve, many of the advisors we've spoken to have expressed the importance of proactive communication with their clients and colleagues. Here is a checklist to assess if you've missed any crucial steps and to help you and your team organize an action plan.

This checklist is yours to use as a starting point or communication guide through these times.

Post Updates & Relevant Notifications to Your Website

Your website is the easiest external communication to update, and is valuable for both your current clients and prospects looking for answers during market volatility.

- [ ] Edit your website homepage with a message to address any immediate changes to your regular business operations due to COVID-19.

  e.g. working remotely, changed hours of operation, etc. This can be achieved through embedding a video, a simple message, or adding a banner to the top of your website.

- [ ] Update your Contact page if you're adding additional means of communication/ hours of operation.

  Are you offering virtual consultations/meetings? For help getting started we've compiled the following; **Tools & Tips to Communicate Virtually With Clients During Uncertainty.**

- [ ] Update your **Google My Business** Account if your hours of operation have changed.

  If you don't currently have a Google My Business Account, considering registering your business with Google to appear more frequently in search results!

- [ ] Update your blog with additional resources for your clients & prospects through this time.

  If you are receiving similar questions about the effect that COVID-19 is having on the market, or you find yourself educating many of your clients on the same topic, create specific content on these topics! The more information you can provide to reassure clients during this time, the more value you're creating for your business now and in the long term.

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Take a Proactive Approach When Communicating with Clients

We recently opened up **the conversation with 6 financial advisors to learn more on how the coronavirus situation is affecting their practice and their approach with client communication.** Many stressed the importance of proactively reaching out to clients to address any concerns before they grew. Here are some tactics to help you stay ahead of the curve!

☐ Email Your Client Database

At the moment, everyone's email inboxes are overflowing with coronavirus business updates. However, the one email your clients are most definitely looking for during these times is from their financial advisor!

Email your client database to let your clients know how they can get a hold of you, any information you'd like to share and where they can find additional resources to their questions. If you currently don't have an email marketing tool, **MailChimp*** is a popular email marketing software. ** Check with your compliance team if necessary for approved tools.*

☐ Offer a Personal/Virtual Meeting

Concerned clients especially need to know during these times that they are made a priority. If you're able to, extend the offer in your email for clients to book a virtual meeting or phone call. Some advisors we've spoken with are finding success by personally reaching out during this time.

☐ Post Updates & Resources to Social Media

Update your social media platforms linking to your blog or other resources that your clients and prospects will find valuable.

Apart from your current clients, there are other social media users who may not currently have a financial advisor and are looking for more information online. Although communication with your clients is most crucial at this time, it's minimal effort to leverage content for a wider audience during this time.

☐ Secure Your Website & Be Vigilant Against Cybercriminals

Your cyber security is very important! Now more than ever as cybercriminals are notorious for ramping up during times of crisis and vulnerability. Remind your teammates, employees, and clients to be vigilant of phishing attacks disguised at 'COVID-19 Updates' and to never open any attachments!

Check that your own website is secure. Do you have an SSL Certificate? If you're not sure, **here's how to find out** or feel free to give us a call at 1-866-638-0273 or email **support@advisorwebsites.com**

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Find Resources for Yourself & Your Team

COVID-19 has brought adjustments for most businesses as social distancing/self-isolating is recommended by health professionals to help flatten the curve of this pandemic. We find ourselves relying heavily on technology to get us through this time. Here are some ways to help you and your team continue to be productive.

- [ ] ### Set-up Your Virtual Office For Success

There are many tools you're able to implement easily for you and your team to stay connected. Several tools our team relies on includes **Google Drive** for document sharing, **Google Hangouts** and **Zoom** for virtual meetings & video conferencing, and **Slack** for daily one-one and cross-department communication. Make sure to also check out **Tools & Tips to Communicate Virtually With Clients During Uncertainty** for more tips. ** Check with your compliance team if necessary for approved tools.*

- [ ] ### Maintain Connection With Your Team

It goes without saying, staying connected with your team is crucial through this time! Set up daily virtual meetings with a set agenda: this may include previous day's accomplishments & struggles, today's goals, and industry updates (if applicable). Make it a habit to check in daily will help keep your team on the same page with client communication, overcoming obstacles & brainstorming together, as well as just keeping morale up during this time. Encourage your team to turn their video on too!

- [ ] ### Stay On Top of the Situation & Current State of Industry!

The coronavirus situation and general state of industry are changing rapidly. Find reliable sources of information, including **FINRA COVID-19 Updates** and bookmark to check regularly. We admit it can get overwhelming, so consider setting a specific time each day and limiting the amount spent reading news updates (e.g. from 1-2pm only).

Our goal is to help support you and your business through this time; what are you struggling with and what would help you most right now? Email us at **marketing@advisorwebsites.com**, we respond personally to every message we receive.

We are in this together. Stay safe!

Clients of Advisor Websites:

We may be remote (& socially distanced) but we're available to help Monday to Friday 10:30am to 8pm EST. Give us a call at 1-866-638-0273 or **schedule a time here if** you have any questions or need help making changes to your website with a coronavirus update.