

First Eagle Client Engagement Series: Mother's Day Spa Open House

Financial professionals today are facing greater pressure to deliver a high caliber, differentiated client experience. Given the increase in competition, you are continuously tasked with showcasing the value of your services and keeping clients engaged.

First Eagle is committed to help you stand out from the crowd with your clients and prospects. To assist in this effort, we have developed the First Eagle Client Engagement Series. The series will provide various client & prospecting engagement ideas and actionable steps for implementation.

What is the client appreciation opportunity?

Mother's Day Spa Open House

Why this client appreciation event is a good opportunity for growing your business?

- Engage and show appreciation for your clients in a fun and relaxing environment.
 - Build new relationships with clients' family and friends, expanding your network in a casual, comfortable setting.
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Recommended Execution Strategies

• Event:

- Rent out local nail salon or spa and invite guests to come for complimentary services.
 - › Ideally, choose a day the week before Mother's Day for the event.
- Serve mimosas for the guests to drink during their treatment.

• Attendees:

- Invite clients who are mothers; encourage clients to invite their mothers and/or children.
- Consider co-hosting with a professional referral source.

• Venue:

- Local nail salon or spa.
- Request preferred time slots to ensure availability.
- Be mindful to rent the salon for an appropriate amount of time for the number of people in attendance.

• Extras:

- Serve mimosas and/or champagne for guests to drink during the event.
- Flowers, bottles of wine, soaps & hand lotions from a local company for guests to take home.

INVITATION SUGGESTIONS

Use these best practices to create an invitation for your event. These ideas can be used for email, mail, or phone calls.

- Promote the event by sending engaging, friendly messages
- Include date, time, and location of the event—preferably in writing
- Provide details about what the event entails including what activities will take place and the food and beverages being served
- Give guests a "RSVP by" date and contact details
- Send a calendar invite via email to all attendees who RSVP yes
- Thank all attendees for coming after the event
- Take time to follow up with those who missed the event

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