Use Downtime To Create Better Uptime
Insights from Tom Hershberger, CEO, Cross Financial, 2020

Loan officers and universal bankers normally spend a portion of their day meeting with customers and interacting with other employees. With some of those contact opportunities in lockdown, can you find a morsel of time to focus on new ways of staying connected?

Customers need your expertise. They, like you, are in the middle of uncertain times. They don’t want to worry about their money, but, it is a natural outcome when things that provide certainty, in their normal routines, are being disrupted.

Increase Your Contacts
Communication to the rescue. If you can find a few extra minutes in your updated daily schedule, use them to connect with your customers. Send an email. Write a short note. Text if appropriate. Find new ways to get connected and offer assistance. Just knowing you are available might be exactly what the customer needs to restore confidence in their financial solutions.

Develop a picture of the customer and ask yourself what might help today. They might be working from home. They might be trying to keep their small business operating. They could even be an essential worker on the frontline. Would an engaging email, note or text make a connection? How about a short telephone call? You have options that will not require a significant time commitment.

Develop New Habits
Make communication with your customers and community leaders a daily priority. Tackle those communications first thing in the morning. It only takes about ten minutes to prepare written communications for several customers. Setting aside your first 30 minutes to communicate with customers will accomplish a lot over the next two weeks. Use your time wisely. Customers will remember the people and businesses that helped them during a time of crisis.

How will you be remembered?

We’d like to hear from you. Send your feedback and thoughts to tom@crossfinancial.com.