A Bold Thought for Your Holiday Greetings

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by Dan Solin

The straw that nearly broke my holiday spirit for me was a card from my postman. It wished me a very happy holiday and best wishes for the New Year. He signed his first name.
I live in a high-rise condominium. Mail is placed in boxes in a room in the lobby of our building. I have never met this postman. Many different male and female postal employees have entered our building over the years.

As far as I am concerned, his card could have read: *Please give me a tip.*

That experience got me thinking: Do your holiday cards send a similar message (like “Please do business or continue to do business with us”)?

**Common practice**

I’m sure many of you were inundated with holiday wishes from those you know and others with whom you have done business. Most advisory firms send out a greeting card conveying some positive wishes for the holiday season. Here are some issues you might want to consider.

**It could miss the mark**

If you are sending a generic Christmas card to all your clients, you’re ignoring the fact that billions of people don’t celebrate Christmas.

While the U.S. is still predominately a Christian nation (with **about 75% of American adults identifying themselves as Christians**), that number is declining at the rate of 0.8% a year. By 2030, a majority of Americans are projected to have no religious affiliation or will be a member of a non-Christian faith.

**Rethink holiday cards**

Standard holiday cards (like the one from my postman) are inauthentic and formulaic. Digital cards are even worse.

You render a valuable service to your clients. Do you really want to cheapen it with a mass-produced card that reflects little time and effort and no customization?

If you decide to continue to send out holiday cards, consider some of these suggestions from an article in *Entrepreneur Magazine*:

**Add relevant information to your greeting**: For example, this year you might include an article containing tips for taking advantage of the new tax law.

**Don’t sell**: Avoid any language that could be construed as self-serving.

**Personalize**: Add photos and a personal note in your handwriting that you customize for each recipient. Relationships are about making an emotional connection.

**A bold thought**
The premise of the Solin Process℠ is an emphasis on eliciting information, rather than conveying it. Consider sending a survey to your clients along with this inquiry: *It's been our practice to send out holiday greetings every year. Is this a good idea or would you prefer that we do something else or nothing at all? Please send us your suggestions.*

Make it easy for them to respond by using a survey service like *SurveyMonkey*. You can add other questions, like:

- How can we improve our communications with you?
- How often do you want to hear from us?
- Do you find the articles we send you helpful?
- How often would you like to meet with us?

You may be surprised by the results.

*Dan Solin is a New York Times best-selling author of the Smartest series of books. His latest book is The Smartest Sales Book You'll Ever Read. His sales coaching practice includes helping advisors convert prospects into clients and generating leads through videos and other elements of marketing. Dan is not affiliated with any advisory firm.*

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