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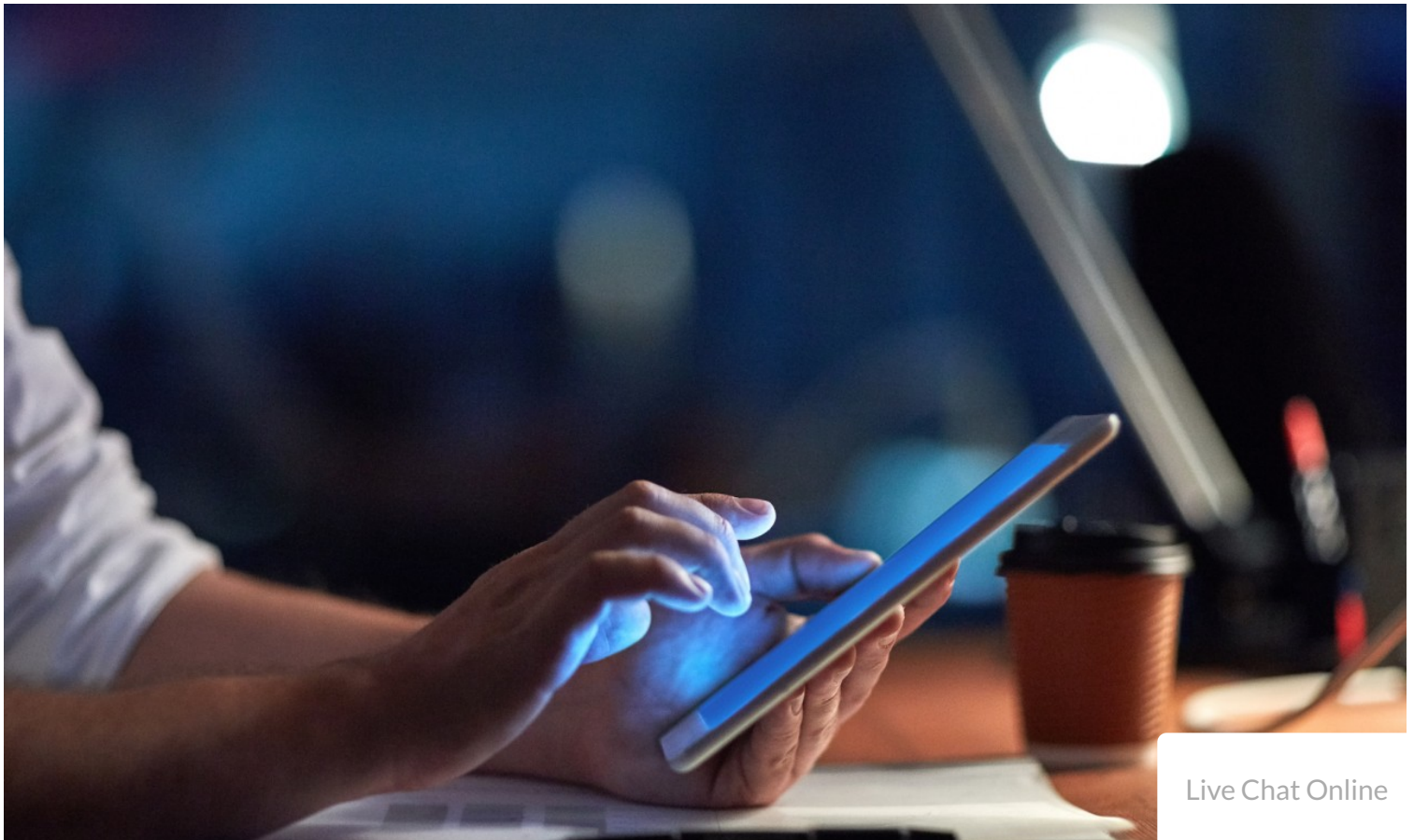
MARKETING

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High-Touch Marketing

High-touch marketing involves thoughtful, targeted messaging tailored to individual customers – and it’s proven to help retain clients. Learn how high touch can be done in an increasingly “touchless” world.



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It is statistically proven that high-touch advisors – those who use thoughtful, targeted messaging tailored to individual customers – retain more clients, regardless of the environment that one is working in. Many distributors in our industry take advantage of opportunities to do something personal for clients that shows the value of the client relationship. This is a retention skill that most reserve for the very elite client.

But it's a skillset that can be adapted to all clients, regardless of activity. Remember, it has been said that it costs six times more to prospect a new client than it does to retain an existing one. So, your ability to add personal value to clients will pay off. But how can high touch be done in an increasingly "touchless" world?

The Goal of High-Touch Marketing

The goal of high-touch marketing is to establish a balance between being seen as personal and trusted while not being too invasive. This marketing is more about relationship management than it is about sales. Often, we hear about "CRM," our customer relationship management. At one point, this became a digitally focused term in reference to the integration of tech solutions for client organization.

The idea behind these technology interface solutions was to help salespeople meet their objectives with clients. Somewhere along the way, this incorporation allowed for the decline of direct relationship building with customers. Technology should facilitate the salesperson's ability to build stronger customer relationships by managing customer-specific data, but should not be used as a primary method of connectivity.



The High-Touch Approach

The high-touch approach is about understanding customers' needs through interpersonal involvement. It calls for high levels of participation to maintain direct contact. The more you understand a client's needs, the better you will be able to support them through a higher-touch method.

However, overcontact within the client relationship can produce dysfunctional effects. Traditionally, marketing has been viewed categorically as either direct or indirect. Direct marketing involves conscious interaction with clients where the sale is a central focus. Indirect marketing provides value to the client without the ask of the sale being indicated.

While both of these can be advantageous, a high-touch approach uses each simultaneously without the risk of overcontact. High-touch marketing is the solution to balancing between the two. A study from 2008 that is still apropos called this "adaptive relationship management," in that the salesperson should work to understand the approach desired by each client.

Tips for the High-Touch Approach:

- Don't discount any client from your high-touch advising approach.
- Avoid passive approaches, such as automation.
- Individually target your messaging.
- Integrate as many forms of communication as possible.

The high-touch approach to marketing and advising can help to retain clients, while building strong, positive relationships with them. To learn more about smart marketing practices, [explore related blogs here](#).

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