

# Building BRIDGES - Newsletter

Cross-Selling Tips from the Cross-Selling Experts

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## RIGHTBRIDGE and THE SCIENCE OF FINANCIAL FORENSICS...

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Of course it all started with Sir Arthur Conan Doyle's brilliant Sherlock Holmes—the archetype for the ever-so-clever forensic detective who solves the impossible case through careful observation and brilliant deductive reasoning. The idea that superior observation and well-ordered logic is the key to detective success still fascinates us today, as witnessed by the innumerable Sherlock Holmes derivatives, including the irascible medical detective, Dr. Gregory House, San Francisco's neurotic murder detective Adrian Monk, the Mentalist, and the many varied iterations of CSI and Law and Order. It even includes the 1950's duo of Jack Webb and Harry Morgan in Dragnet. No criminal is safe when these intrepid souls get "the facts, ma'am – just the facts."

If you think about it, most of us working in financial services have a lot in common with Holmes and Watson in that our success in helping clients always starts with great fact finding. Teasing out details about a client's financial situation, and their goals, and desires is both fascinating and rewarding – for both the representative and the client, since better facts always lead to better recommendations and solutions. Most would agree that those at the top of our industry are also those who are best at finding unique and meaningful solutions to the client's financial problems.

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## BEYOND SHERLOCK

But consider this – even the master Sherlock Holmes could never work on more than two or three cases at a time. Dr. House is almost always focused on a single complex medical mystery. There are simply too many details to keep track of to do anymore. But you likely have hundreds of clients to keep track of! How on earth can you keep all the relevant details about each and every client front and center to make sure you don't miss some crucial element of their planning needs? After all – that's part of the deal you made with them, isn't it? If they agreed to let you be their adviser, you will do your best to make certain that their needs come first. That's an important responsibility you bear.

So, how do you keep track of hundreds, or even thousands of clients? That's where technology steps in. RightBRIDGE works like an ever vigilant assistant that constantly sorts through all of your clients' relevant financial data to make sure that you don't miss important details – like an impending age change (for life insurance), or the right moment to open a discussion of long-term care insurance for either your client or their parents. RightBRIDGE sifts through the data every single night to make certain you don't miss a term conversion opportunity, or a need to discuss a potential conversion to a Roth IRA. Depending on the metrics your company chooses to follow, RightBRIDGE is working on your behalf to draw your attention to the most important and timely events that may be important in your client's lives.

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The simple fact is that no matter how brilliant you are personally, you can still focus on just three or four cases at time – at least if you are dependent on your own memory. But with RightBRIDGE can you make certain that all of your clients are being monitored, and that you are always reminded of the three or four you ought to be focusing on right now. Interesting alliteration isn't it – RightBRIDGE Right Now.

## RightBRIDGE and Cross-Selling

But, as powerful as RightBRIDGE is, it's still up to you to look at the dashboard each day and to take action on behalf of your clients. Many tasks can be delegated to others on your team. But the important ones need your attention. Fortunately, RightBRIDGE not only flags important events, it tells you why they've been flagged, along with suggestions on how to approach your client about the potential need.

So, take some time each day to check in with RightBRIDGE. You can even improve the validity of the detective work by adding important information to the RightBRIDGE database that is not available to your company, but rather from the facts you gather face-to-face. Let RightBRIDGE be your Dr. Watson to your Sherlock Holmes. Your clients are the ones who will benefit.