

# Upgrade Your COMMUNICATION

When you have exciting news to share with a client or are looking for a creative way to re-engage with a lukewarm lead should you text or call? The debate is real and there is no need to overthink it. Take a read through these ideas to help you consider the purpose of your communication and then to choose the best way to connect.

Know When  
to Text and  
When to Call



## Reasons to: **TEXT**

- #1 Reconnect to a Lead**  
If it's been awhile, you can text with a quick reminder of who you are and why you are texting them. Not only does this help you avoid the dreaded, "Who's this?" text, it makes it easy for you to pick up where you left off.
- #2 Brighten Someone's Day**  
Few simple things can lift someone's day like a compliment, a funny picture or thoughtful affirmation. Texting is perfect for this. Before hitting send, consider the time of day and strive to keep your text messages during traditional work hours.
- #3 Adding Value**  
When your hot lead has gone stone cold, it can be tough to know what to say. A short text that acknowledges and provides an update to your previous conversation can be a helpful first step to re-start a conversation.

## Reasons to: **CALL**

- #1 Connect to a Client**  
It's easy to fall into patterns of texting and this can dilute your relationships. When you haven't spoken with (or seen) a client for a while, make it a priority to hear their voice and discover what has been going on in their lives.
- #2 Sharing Detailed Information**  
When you have information that is proprietary or needs further clarification, pick up the phone to talk it through. Not only does this prevent misunderstandings, it relieves you from the pressure of being perfect.
- #3 Need to Cancel**  
Unfortunately, we all must occasionally cancel or change plans. When this happens, pick up the phone. This way, you can be confident that your client is informed with ample time to restructure their time.

Whether you choose to call or text, it's important that you log all of your business activities in a reliable CRM like Referral Maker® CRM. Not only will this help you to track your conversations, it will prompt you to rank your relationships so that you can focus on the ones that lead to more profitability. **Sign up for a free trial at [buffiniandcompany.com/freetrial](https://buffiniandcompany.com/freetrial)**