Set Up Your Space for Success

by Heather Hooper

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I've had the great pleasure of visiting hundreds of advisors' offices over the years. While I've certainly seen a distinctive shift to a warmer, less formal feel, many recently redecorated spaces are not always friendly for clients in mid to late retirement.

Why does this matter? Your office is an important part of your brand and your client experience. Unlike many younger clients, older clients tend to prefer visiting with you in person. And there is a great deal you can do to make their visits convenient and enjoyable.

Here are some quick tips to help you create a more comfortable setting for clients in retirement (which many non-retired clients will also appreciate):

Entering and Exiting

Make entering and exiting your building and office easy for clients using wheelchairs or requiring assistance.

1. When possible, ensure that you have clearly marked handicapped parking spaces

available as well as walkways wide enough to accommodate walkers and wheelchairs.

2. Sidewalks and parking lots should be well lit.
3. Doorways should be 32 inches wide for a wheelchair user to be able to comfortably fit through.
4. Make sure your building and office doors are easy to open or that you have someone available to assist your clients into the office.

Waiting Area

When was the last time you sat in your waiting area and looked at it through the eyes of a client? Here are some must-haves for a positive experience.

1. Comfortable, firm seating that isn't too low and is easy to sit and stand from. Arms on chairs for support also help
2. A clear table to set down personal items
3. Enough room to move around with assistance
4. Make sure the height of your reception desk is wheelchair accessible.
5. If you have a television (which generally isn't recommended), be mindful of what is showing. Don't set the channel to financial or world news — instead feature the home network or cooking shows to set a more relaxing atmosphere.
6. Have non-financial reading materials available, like books on art and travel
7. It's not uncommon for older adults to use diuretics which make you thirsty so make sure to always offer something to drink.
8. Be sure to offer a snack as well. Some firms even have menus of snacks and drinks which they change seasonally.

Ambiance and Tone

Make a great impression throughout your space.

1. Find a local artist you love and decorate with their pieces to diverge from standard

office art and show a sense of community. They may even allow you to borrow, rather than buy, the art!

2. Create a “Dream Wall,” featuring pictures from clients achieving meaningful moments, such as travel, building a second home, graduations, celebrating with grandchildren, retiring, etc.
3. Use glare-free lighting, energetic warm colors or calming cool colors with simple décor throughout the office.
4. Commit to a clutter-free environment.
5. Be mindful that older adults may experience hearing loss. Higher frequencies and loud sounds can aggravate those challenges. Speaking slightly slower and in a consciously lower tone can help enhance communication.
6. Keep any music low and noise to a minimum.

Meeting Room

Whether you meet with your clients in your office or in a conference room, you want the space to set a conversational tone in a comfortable but professional atmosphere that’s easy to navigate.

1. Ask if the room is a comfortable temperature. As we age, our bodies’ thermoregulation changes. Being too hot or too cold can be distracting.
2. Choose to sit on the same side to promote higher engagement. Sitting behind a desk or on the opposite side of a large table can create barriers.
3. If you prefer a living room feel to your meeting space, ensure it is practical and there is plenty of space to navigate the furniture easily. Seating should be comfortable but firm and not too low/deep; arms on chairs are a must and tables should be easy to reach while seated.
4. If clients are signing paperwork, reviewing documents or filling out forms, set them up with an ergonomic table and chair for these tasks.
5. If you have charts, processes or graphs displayed, make them large enough to easily see.
6. If you have forms that require client input, ensure the font is large enough to be

easy on the eyes and there is enough space to write (or have someone available to populate the information on your clients' behalf).

Restrooms

For advisors who have restrooms in their offices, here are a few quick tips:

1. Restrooms should be well lit with non-slip flooring.
2. A round doorknob can be difficult for older adults with arthritis or poor hand strength to grasp and turn. Replace the knob with a lever for easy opening.
3. A raised toilet seat, at least 17 inches from the floor, is easier to use. A rail to the side is also beneficial.
4. The sink should be 34 to 36 inches from the floor, so clients don't have to stoop to wash their hands.

Recognizing we don't always have 100% control of our office spaces, note that half the battle is being aware of your space from a client's perspective so you can adapt, improvise or overcome any challenges. Your clients will appreciate the effort. Happy redecorating!

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