🗹 REALITY CHECK

Name: Click and type

Date: Click and type

Once you’ve completed this strategy, please submit your completed Reality Check as follows:

* + - Complete this document with your answers.
		- Save a copy of your completed *Reality Check* and email it as an attachment.

The Re-Welcome Process

1. Why is it important these high value clients experience the Re-Welcome Process? Click and type
2. What are the specific steps in the Re-Welcome Process? Click and type
3. How might the reaction of an existing client differ from that of a new client at this point in the process? Click and type

Summary of Rebranding with Your Top Clients

1. What area of the rebranding process are you excited to share with your top clients? Click and type
2. What area of the rebranding process are you having difficulty with as it relates to sharing with your top clients? Click and type
3. Do you have all the items required for rebranding: Introduction Kits, Cards, PFO Binders? If NO, specify what you need to order: Click and type
4. Identify the **first three clients** you will be bringing through this process by first name and last initial only:

1 Click and type

2 Click and type

3 Click and type