HELPFUL TIPS TO IMPLEMENT FORM

The FORM process involves gathering, storing and using information about your high value clients regarding their Family, Occupation, Recreation and Money (FORM) to solidify and competitor-proof the relationship with them.

Tips on How to Begin the FORM Process

The implementation for the FORM process is as follows:

- Print a FORM Gathering Template for every A level client (AAA, AA, A) you have and write the name of each A level client at the top. They are to put these in a holder labeled FORM. Alternately, you can complete this online in the FORM feature of your CRM. Choose the process that will work best for you.
- You need to decide on a reasonable deadline for having FORM started for each of your A level clients. The time-frame you've chosen and the number of clients you have in your A level groups will determine how many you need to complete each week.

  You should have no trouble completing at least one or two client FORM profiles per week without adversely affecting your capacity. Remember: this is just a starting point.
- If you have an Assistant, add FORM to your weekly Team Meeting Agenda to keep this new project top of mind for everyone. With a heightened sense of awareness, you and your team are more likely to continue to practice collecting and using FORM. The FORM coordinator will address this item on the Agenda.
- For each existing A level client (AAA, AA, A) you need to complete as much as possible on the FORM Gathering Template. Or, you may add this information directly to the FORM feature of your CRM – if this is your chosen approach.
- Next, you may want to review client files for notes to captures important FORM details captured during previous meetings and/or calls.
- Finally, any others who assist you in servicing your clients should review the FORM Gathering Template and add to the FORM information based on their knowledge of the client.

If you have a multiple-member servicing team, everyone on the team needs to review the FORM information to ensure you capture as much initial FORM information possible. You may be surprised at the level of information or possibly even the non-information captured by your staff.

If you are NOT able to satisfactorily complete this description for your high value clients, then you need to gather this information NOW. Gather information about lifestyle and interests during your review meetings, through your call rotations, events, and via your staff (who are often a great resource for information about your clients.)

Note: We <u>NEVER</u> recommend using a survey to collect FORM information because most of your high value clients will expect you to know this about them already. For your new clients, FORM information can easily be gathered during the first and second appointments.

Use Your Contact Management System to Store FORM

As you complete the ***FORM Gathering Template*** for each client, log their FORM information into your contact management system. This will ensure everyone can easily store, view, share and utilize the FORM information gathered. Do NOT bury this information in meeting notes and client history because it will not be used. The FORM information needs to be in an easy to access location on the contact management system.

Going forward everyone who services your clients' needs to be attentive to continue to gather and communicate new FORM information about all your high value clients.

This means every time a client interaction takes place:

- You use the FORM information to establish rapport; and
- You genuinely gather additional FORM information.

Your Annual FORM Review

Take the time once a year to undertake a comprehensive analysis of the data and prepare a demographic overview of your client-base. You will use this information to deliver customized client service packages and to decide how to market your practice.

Don't just Collect FORM, Use It

Use FORM to ensure communication with your clients is purposeful and meaningful to them. This includes several elements of your Advocate Service, including moments of truth, call rotations, articles of interest, events, etc. These are the activities that allow you to create the 'rave' factor with your best clients. We will talk about this in detail in the next strategy.

Ultimately, you will quickly observe how using FORM based information is an important building block in establishing enduring relationships with your high value clients.