

# What You Can Expect from this Best Practice

## PURPOSE

- To establish rapport and understanding with a potential new client, so you can both make a well-informed decision about working together
- To tell potential new clients about you, the Credit Union/Organization and your approach to financial planning
- To build trust in you, the Credit Union/Organization and your ability to provide financial planning advice
- To use the FIT meeting with all potential new clients to ensure you continue to work with clients who are well suited to what you offer
- To ensure clients can clearly and precisely tell others about you, the Credit Union/Organization and your approach – in the context of advocacy

## EXPECTED RESULTS

You will:

- Build your client relationships within forthright and well-understood parameters
- Have an agreed upon process to follow when doing business with those clients who decide to work with you, and with whom you decide to work
- Preemptively answer many of your client's questions
- Ensure that you are not selling at the implementation meeting
- Set the stage for a productive and professional relationship
- Feel confident and empowered in your partnership with new clients

Your clients will:

- Trust you more readily because you clearly state your process, and their role within the process
- Learn what they can expect from you and what you expect from them
- Notice consistency in the ways that you represent yourself, the Credit Union/Organization and your approach
- Share your process with friends, family and associates when they are introducing you or recommending your services

## ACCOUNTABILITY

You will:

- Use an Agenda every time you meet with a potential new client
- Be consistent in the way you represent yourself, your Credit Union/Organization and your approach by rehearsing your script
- Commit to learning what is important to the potential new client
- Be prepared to use all resources involved in the FIT Meeting
- Realign individuals who are not a good FIT for you to a suitable financial representative within the Credit Union/Organization
- Always follow the process to maximize results

Your clients will:

- Be more receptive to your financial planning advice and suggestions
- Talk about your trustworthiness
- Talk enthusiastically about what you do and how you do it
- Be clear and precise when describing you, the Credit Union/Organization and your approach to their family and friends