

# What You Can Expect from this Best Practice

## PURPOSE

- To have your high value (and other select) clients begin participation in your Existing Client Process
- To contact your high value clients and enthusiastically inform them of the process you will be going through together

## EXPECTED RESULTS

You will:

- Effectively set the stage for the subsequent meetings with your high value client using a series of pre-meeting steps
- Begin to make a professional 'second impression' on high value clients
- Create enthusiasm with your high value client about what to expect

Your clients will:

- Understand there have been some enhancements in your approach that you are going to tell them all about it
- Look forward to hearing about and experiencing these enhancements
- Become familiar with your Introduction Kit

## ACCOUNTABILITY

You will:

- Ensure that each of the Pre-Appointment process steps are implemented
- Delegate steps if and where appropriate to ensure consistently

Your clients will:

- Review the Introduction Kit
- Provide any items you have requested they bring to the meeting