

New Client Process

To turn your clients into advocates, you need to follow a consistent process. The following process outlines a series of mail-outs, phone calls and meetings that you **MUST** follow when a potential client is introduced to you. Details and scripts for each meeting will be reviewed in each of the subsequent strategies.

1. Pre-Appointment Phase

- Mail a **Thank You Note** to any existing client who recommends a prospective client to you. It's important to always acknowledge the source of the new introduction at the time of the introduction. This may also involve acknowledging gratitude to other branch staff in some way.
- **Call the potential client to introduce yourself** (or they are calling into you) and lay out the first steps in the New Client Process, including setting up the 1st Appointment.
- Send the **Confirmation Email**
- Make the **Confirmation Call**

2. The FIT Meeting (First face-to-face contact)

- Conduct FIT Meeting:
 - Agenda driven meeting and determines FIT and next steps
- Note: For a baseline client with very simple requirements, their needs can be met in one meeting (**the one and done approach**) and for those with moderate needs, they can be managed in a two-meeting approach (fit and implementation). In these cases, you may need to gather additional financial information over the phone, via email, or drop off in hard copy prior to setting up the Implementation Meeting.

3. The Implementation Meeting (when required)

- Make Implementation **Confirmation Call**.
- Conduct **Implementation Meeting**:
 - Agenda driven meeting
 - Move forward with Implementation with Account Documents & Transfer Forms

4. Welcome Aboard!

After implementation, your new client will be on the receiving end of a variety of unexpected welcome activities:

- A Welcome Card for your "Top 20" Clients only.
- Send a simple Welcome Email to all new clients.
- First statement and Service Call to all new clients.