**New Client Checklist**

New Client Name:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Step** | **New Client Activities** | **Completed on:** |
| **PRE-Appointment**  | 1 | Send a Thank You Card to your referring client[[1]](#footnote-1)  |  |
| 2 | First Contact & Set Appointment with potential client |  |
| 3 | Send Confirmation Email  |  |
| 4 | Make FIT Meeting Confirmation Call  |  |
| **FIT Meeting**  | 5 | **FIT MEETING** with Agenda & Introduction Kit* Fit
* Fact Finding (now or via distance)
* Implementation (If appropriate)

   |  |
| **Implementation Meeting**  | 6 | Make Implementation Confirmation Call  | *If required* |
| 7 | **IMPLEMENTATION MEETING** with Agenda  | *If required* |
| **Welcome**  | 8 | Send New Client Welcome Card (Top Tier Only)  |  |
| 9 | Send New Client Welcome Email |  |
| 10 | First Statement & Care Call (Top Tier Only) |  |
|  | **New Client Process Completed:** |  |

1. This is the only step in the process directed at your existing client: all others are with the potential client. [↑](#footnote-ref-1)