**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)