

Be Strategic with Your Review Meetings

Making it Turn-Key

By setting these as recurring activities on your CRM, you can thoughtfully spread these out through the year to make it manageable. We also recommend you make Confirmation Calls a routine process so that review meeting preparation is not wasted on meetings which may be forgotten or rescheduled. Your clients will appreciate the reminder.

Create Chemistry & Continue to Build Trust

As part of your standard Review Meeting preparation, it is important you carefully review the Client Profile. This information will provide you with important information to allow you to easily connect and build rapport with your high-value clients.

It gives you a great opportunity to follow up on any 'current events' like recent trips, moves, jobs, changes in the family or any other personal news. This impresses people and it is rare. Clients are surprised you remember and appreciative that you are following up. We've all been here – and it feels great. It builds trust.



Lastly, you can bring the gold standard to your high value clients by noting what their favorite beverage is. Instead of asking what they'd like every time they come in to meet, it's already waiting for them. This is another crowd pleaser.

Respect Everyone's Time

An Agenda is an excellent approach to making sure everything gets covered in the time allotted. It also shows your client you value and respect their time. It creates a consistent experience for them which increases trust. It's also important you always start and end your meetings on time. The top of the Agenda provides a place for time and we encourage you to include both: the start and end time (i.e. 1:00 – 2:00 pm). This provides everyone with a keen sense of the time available. If you haven't allowed for enough time in between your review meetings, you may be in a position where one extra-long meeting negatively impacts the next client meeting or next scheduled activity on your calendar. Again, we've all been on the receiving end of late appointments and it doesn't create a positive feeling and can erode trust if done consistently.

Enjoy the Time with Your Clients

Being proactive with planning and facilitating your Review Meeting means you spend less time thinking about what's next and more time simply focused on your clients. The most important thing you can do for them is enjoy their company, actively listen, answer questions, and make sure they leave the office feeling like it was time well spent.