**New Client Checklist**

New Client Name:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Step** | **New Client Activities** | **Completed on:** | **Completed by:** |
| **PRE-Appointment Process** | 1 | Send a Thank You Card to your referring client[[1]](#footnote-1) |  |  |
| 2 | First Contact & Set Appointment with potential client |  |  |
| 3 | Provide the Introduction Kit with Confirmation Letter |  |  |
| **Fit Meeting Process** | 4 | Make FIT Meeting Confirmation Call |  |  |
| 5 | **FIT MEETING** with Agenda |  |  |
| 6 | Make “Is there a FIT?” Call |  |  |
| 7 | Send Confirmation Letter & Checklist |  |  |
| **Fact-Finding Meeting Process** | 8 | Make Fact-Finding Confirmation Call |  |  |
| 9 | **FACT-FINDING MEETING** with Agenda |  |  |
| **Implementation Meeting** | 10 | Make Implementation Meeting Confirmation Call |  |  |
| 11 | **IMPLEMENTATION MEETING** with Agenda |  |  |
| 12 | Send New Client Welcome Card (and Gift) |  |  |
| 13 | Make First Statement Review & Service Call |  |  |
|  | **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)