

# What You Can Expect from this Best Practice

## PURPOSE

- To give newly transitioned clients an exceptional transition experience as your new relationship gets underway - they will immediately sense the benefit of the MFIS role
- To create an awareness and understanding of the MFIS role.
- To reinforce you have all the solutions, advice and service to meet their current needs
- To reinforce that as their needs change, we can continue to meet them through our wealth continuum approach
- To continue to increase trust in you, the organization and your approach
- To demonstrate your proactive approach to managing client relationships

## EXPECTED RESULTS

You will:

- Have the confidence to know you have a solid track to run on when transitioning clients (i.e. you aren't winging it)
- Feel great knowing newly transitioned clients have been fully brought into the fold with this comprehensive, client-focused process, which delights (yet again) with the unexpected
- Provide the client with a renewed opportunity to fully leverage the various services and solutions available at the organization/credit union
- Build trust and rapport with your new member

Your clients will:

- Know you are there for them as their MFIS and pro-actively managing the relationship
- Feel important and appreciated, which is important
- Experience continued client servicing after they have given you their trust and confidence – this is just the beginning of a brand new relationship

## ACCOUNTABILITY

You will:

- Create and deliver a Client Transition Process your clients will appreciate and tell others about
- Involve others at the organization to ensure it is delivered flawlessly every time

Your clients will:

- Talk enthusiastically about what you do and how you do it – to anyone who will listen