

What You Can Expect from this Best Practice

PURPOSE

- To have a new client participate in your New Client Process – an approach unlike anything they've experienced from most of your competitors
- To make initial contact with a potential new client that creates a great first impression even before you meet them in person
- To create an initial awareness about who you are, the Credit Union/Organization and what you do - to ensure the individuals who do come in to meet with you are the well suited to your area of expertise

EXPECTED RESULTS

You will:

- Make a professional first impression on a potential new client
- Be confident and in control leading the relationship with a pro-active approach
- Set the stage for FIT

Your prospects will:

- Appreciate the organized and professional New Client Process
- Better understand what you do and who you are best suited to work with
- Be unimpressed if they should ever meet with another financial professional who does not provide them with a pre-appointment process like yours

ACCOUNTABILITY

You will:

- Ensure each of the 4 pre-appointment steps are implemented
- Delegate steps where appropriate to ensure consistently

Your clients will:

- Tell you AND OTHERS how impressed they are with this process