

Make a Great First Impression & Differentiate Your Branding

When it comes to potential new clients, the first impression we make is the one that counts. Like everything else in life, if our first impression isn't a good one, it may be the last one. And, if you are like most people, you've had an experience where you were genuinely concerned by the lack of service, process and professionalism that you could barely believe it. You may have even told others about your negative experience – a cautionary tale to others to 'stay away'. Years ago, this might have made for interesting water cooler talk. Now, with the unlimited reach of the internet, it can easily become blogged, tweeted and posted on numerous social media sites – this is our new reality. Imagine on the other hand when your service expectations are exceeded and you are equally excited to share your story with friends and family - in person or online.

You have the opportunity right now to consciously break free from the typical and mediocre approach Financial Professionals follow when they meet someone – which is typically have a phone conversation and book an appointment. Yes, this approach is fine *if* you want to swim in the pool of sameness as everyone else, but if you want something that sets you apart and provides enhanced branding you need to do things differently.



By taking the time to allow your prospect to experience a structured, professional and client-focused set of communications leading up to your first meeting you are in a unique opportunity to build trust. Even better, this type of approach helps identify and attract candidates that are well suited for your services – yes, your ideal clients.

Our simple Pre-Appointment process will help you properly set the stage for the first appointment and create a very good first impression. It creates a distinct impression that you are process-driven, client-focused and successful at what you do (scarcity). And think about this for a moment: if you implement this process as we outline it you will have made multiple points of meaningful contact with your prospective new client over about a 2-week period, which in many cases is more than they've heard from their own Advisor over the past year.