

## NEW CLIENT ADVOCATE PROCESS Advocate Flowchart

## Introduction Received.

Pre-Appointment

Thank You Card Sent
Introduction Call
Introduction Kit Sent
Ist Appointment Booking Call
Confirmation Letter and Call



1st Appointment

"Is It A Fit?" Agenda, Scripts, and Goals The Pre-Appointment
Process establishes
your process and
allows you to
introduce yourself in
a professional
manner.

The "FIT" process is a point of distinction and sets the framework for your entire relationship with a client.

2nd Appointment
"Data Gathering"
Agenda, Scripts, Fact Finder,
and Introduction Process



3rd Appointment
"Implementation"
Agenda, Scripts, and PFO



4th Appointment (Only if required)

Even though the paper work is signed, the Advocate Process is not over. You need a follow-up process that is client-centered to kick-start the new relationship.

New Client Welcome

Welcome Card

Welcome Letter

Welcome Gift

1st Statement and Care Call



Advocate Service

Ongoing Client Service: It is delivered the same way, each time, on time, every time