

## NEW CLIENT PRE-APPOINTMENT

# How to Make A Great First Impression



When it comes to potential new clients, the first impression you make is the one that counts. Like everything else in life, if your first impression isn't a good one, it will be the last one. And, if you are like most people, you've had an experience where you are so shocked by the lack of service, process and professionalism that you could barely contain the look on your face, let alone your desire to tell others about this tragic experience. Years ago, this might have made for interesting water cooler talk. Now, with the unlimited reach of the internet, it can easily become blogged and chatted about everywhere... ouch.

Now, as a Financial Advisor, you have a unique opportunity to break from the pack and create a pre-appointment process that is second to none. Make no mistake – this is the kind of thing that distinguishes you from other Advisors for all the right reasons. A bonus to this approach is that it actually helps you to weed out the 'non-serious' from the 'serious' potential new clients. We know you are busy and the last thing we want you to do is waste an hour of your time on someone who isn't serious about leaving their current Advisor. We've all met them at some point: Those looking for better rates, cheaper fees, or free second opinions. Well, let them bargain shop somewhere else.

Our simple six-step process will properly set the stage for the first appointment and create a very good first impression.

In fact, this highly structured and professional pre-appointment process is bound to garner you attention ~ for all of the right reasons. It creates a distinctive impression that you and your practice are process-driven. It also trains potential new clients to follow your lead through virtually every aspect of your financial planning practice. Furthermore, it is such a pleasant experience that your new clients won't hesitate to refer friends and family to you ~ so they too, can be delighted by your professional process and benefit from the financial planning solutions you have to offer.

Don't forget to leverage your Assistant. There is one step in this process that we highly recommend is implemented by the Advisor, and it is the initial contact by telephone to the potential new client. Everything else can easily be managed by your Assistant. Make sure you communicate with your Assistant regarding each step of the process they are responsible for. Next, map out a detailed process for each step so you can ensure quality control and consistency.

The bottom line here is that if you implement our preappointment process, you will have made 4 or 5 points of meaningful contact with potential new clients over a 2 week period – which is likely more than they've heard from their own Advisor during the past 12 months. More often than not, the potential new clients are delighted before they even look you in the eye and shake your hand. Now, that is creating a great first impression.

