

# The Introduction Process Approach

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The Introduction Process is not a one-time event. It is an ongoing process of education and reinforcement – for both new and existing clients.

Remember, it's not a matter of IF your clients will know someone who needs your help - it's a matter of WHEN.

Adopt A Steady And Consistent Approach to Introductions and Your Value-Added Services



## 1 You Will Share the Introduction Process With a New Client for the First Time in the 2nd Appointment in the New Client Process

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- Provide a full description of the Introduction Process in the 2nd Appointment. (Refer to the 2nd Appointment Advisor Script.)
- Reinforce the Introduction Process with a timely reminder in the 3rd Appointment. (Refer to the 3rd Appointment Advisor Script.)

Each of the steps for new clients will be described in full detail in the New Client Process.

## 2 Starting Now (If You Haven't Already Begun) Use the Introduction Process Script With Existing Clients.

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- Add an item to your client meeting agenda called Our Value-Added Services.
- Point to the item Value-Added Services on the Agenda
- Bridge the topic with a lead-in like:

*Client, we are asked from time to time we are still taking on new clients. The simple answer is that we will **always** do our best to help the people that are important to our top clients.*



*To that end, I've written up a short process that I am going to share with you today that will let you know how to handle the situation of encountering a friend, family member, or colleague that may have need of our services.*

*I am going to review this with you today and we'll revisit it in the future. [Share Your Introduction Process]*

Each of the steps for existing clients will be fully covered in the Existing Client Process.

### 3 Reinforce Your Introduction Process at All Client Meetings.

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- Use the Introduction Process Script at ALL client meetings.
- The steps on how to do this will be fully detailed in the Review Meeting strategy.

### 4 Reinforce Your Introduction Process During Client Calls – As and When Appropriate.

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- Use the Introduction Process Script during calls with you best clients when you are calling them related to market volatility and uncertainty.
- Always be natural, conversational and confident when communicating your Introduction Process.

**Remember** – If you see an uptick in referrals, don't stop this process. Continue imprinting your process with top clients so that they will remember your process if/when they encounter friends, family members and colleagues who have need of your services.

