



2 EXPLORE

*Making contact and exploring the client,
the business, the value and the offer*





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STEP 2 - EXPLORE

Making contact and exploring the client, the business, the value and the offer

Welcome to the second step in the Client Engagement Process Skills Goodie Bag.

'Explore' is the second of six easy steps designed to help you support your advice business and streamline your client engagement process.

It contains a comprehensive set of templates for businesses that are making contact and exploring the client, the business, the value and the offer.

What's it all about?

Explore is about making the process of first engaging with the potential client as easy as possible, with a range of material ready to be supplied including:

- Checklist and collection forms for initial telephone enquiry
- Exploratory meeting client information pack – with agenda, travel guide, introduction and more
- Exploratory meeting business information pack – with checklists, guide, explaining the business and next steps.

The tools are designed to provide each member of your team with the right document required for that stage of the engagement process, including team member scripts, data collection, and client communications.

What's in it for you?

This step also includes additional forms to be used if the client is ready to move to the discover stage. These tools include:

- Confirmation letter of agreement to proceed to the discover stage
- Confirmation letters where the client won't proceed to the discover stage

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1.	EXPLORE	TOOL TYPE
Purpose	Making contact and exploring the client, the business, the value and the offer	
2.1	Making contact	
	2.1.1 Checklist for taking initial telephone enquiry	Checklist
	2.1.2 Personal details form for initial telephone enquiry	Data collection
	2.1.3 Exploratory meeting confirmation letter	Client comms
2.2	Exploratory meeting client information pack	
	2.2.1 Exploratory meeting preparation guide	Client prep guide
	2.2.2 What to think about	Client prep guide
	2.2.3 Agenda for exploratory meeting	Agenda
	2.2.4 Client-focused business introduction	Marketing
	2.2.5 Travel guide	Client comms
	2.2.6 Team intro sheet	Client comms
2.3	Exploratory meeting business information pack	
	2.3.1 Checklist for exploratory meeting preparation	Checklist
	2.3.2 Checklist for greeting potential client	Checklist
	2.3.3 Guide to exploratory meeting	Team member guide
	2.3.4 What's important to the client information capture form	Data collection
	2.3.5 Explaining the business and your value	Team member script
	2.3.6 Explaining the process	Team member script
	2.3.7 Gaining agreement to proceed to the discover stage	Team member script
	2.3.8 Explaining the next steps	Team member script
	2.3.9 Agreement to proceed to the discover stage	Agreement
	2.3.10 Additional details form	Data collection
	2.3.11 Confirmation letter of agreement to proceed to the discover stage	Client comms
	2.3.12 Confirmation letter where recommendation is not to proceed to the discover stage	Client comms
	2.3.13 Confirmation letter where the client decides not to proceed to the discover stage	Client comms