SKILLS GOODIE BAG

Your guide on how to use it and get results

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REVOLUTIONALISE YOUR CLIENT ENGAGEMENTS – GETTING STARTED

Welcome on board. Here's to enhancing your client relationships with your very own copy of the Client Engagement Skills Goodie Bag.

It is an ingenious package of cheat sheets, tools and templates that will transform your client engagement process. Specifically designed for financial advice businesses, the Goodie Bag provides a proven six-step formula for successful client engagement, from enticing the client right through to formalising an agreement and managing the relationship on an ongoing basis.

You have at your fingertips 65 time-saving tools that will guide you through the entire process. Consider it like a filing cabinet of pro forma documents, with collateral covering nine key areas of client interaction. Simply follow our six-step process, action the corresponding tool, and stay in front of your clients mind. The comprehensive suite of resources will ensure that your client dealings are consistent and professional. Use what we have created to eliminate inefficiencies, boost productivity and free up valuable time and resources to get more clients and grow your business.

The Skills Goodie Bag includes a combination of business-facing tools, for internal use only; and client-facing tools, to be provided to your client. Every advice business is different, and we don’t prescribe a one-size-fits-all approach. Instead, each tool can be customised to suit your unique needs and business model, without having to start from scratch.

Client-facing documents often include italic text in ***<brackets>*** indicating where you can add your own personalised text/instructions. Italic instructions in normal ***(brackets)*** are for your information only and should be deleted before using the tools.

All tools correspond with the ‘Client Engagement Process - Table of Tools’ later in this guide and include: tool number, purpose, tool type and intended user. The content can be cut and pasted from below the dotted line under the title and imbedded in your branded documents, such as letterhead or email templates. Alternatively, they can be added electronically into your CRM system/software, such as Xplan, Coin, Sales Force, Mid Winter, InfoTech, Infusionsoft etc. We’ve done the hard yards so you can get on and do great business.

Here’s to your success!

HOW TO USE GUIDE: Client Engagement Goodie Bag
PURPOSE: *This how-to guide is the master index of your skills Goodie Bag. It will help you navigate the templates and resources contained within our simple six-step client engagement toolkit.*
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INCLUDED IN THE SKILLS GOODIE BAG

There are nine types of tools and templates included that cover each step of the Client Engagement Process, including:

1. Marketing
2. Client communications
3. Checklists
4. Data collection
5. Client preparation guides
6. Meeting agendas
7. Team member guides
8. Team member scripts
9. Agreements

MARKETING

There are a number of marketing templates, including offer documents to specific target markets, and a one-page client-focused business introduction document. You will need to customise these according to your business and target markets.

To customise your offer documents, first confirm your target markets. Then simply follow the format of the offer document templates and replace the provided text with text that is relevant to your clients and your business.

CLIENT COMMUNICATIONS

These tools and templates will include confirmation, follow up letters and email drafts for you to customise with your unique style and branding, and personalise when addressing a potential or existing client.

CHECKLISTS

Checklists are provided for a range of activities including greetings, meetings and preparing advice. These also should be customised according to your business processes and protocols.

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DATA COLLECTION

A number of data collection forms are contained in the Goodie Bag. These are for team members and potential or existing clients. These should be customised according to your business and, where appropriate, personalised for individual clients.

CLIENT PREPARATION GUIDES

There are several tools and templates designed to assist potential or existing clients prepare for meetings or future discussions. These are critical to the success of the whole client engagement process. Again, these should be customised according to your business and/or client needs.

MEETING AGENDAS

Sample agendas are provided for general meetings and discussions with potential and existing clients. These should be customised according to your business and/or client needs.

TEAM MEMBER GUIDES

Team member guides provide an overview of the objectives and structure of the various meetings and discussions with potential and existing clients. These will need to be customised according to your business and personnel position titles.

TEAM MEMBER SCRIPTS

Team member scripts provide a structure for explaining key components of meeting agendas and discussions.

These include: explaining the value the business provides, how that value is delivered, the fees the business charges, and the experience the client can look forward to in a relationship with the business. These should be customised according to your business and/or client needs.

AGREEMENTS

There are a number of agreement templates prepared in order for the potential or existing client to acknowledge progression to the next step in your client engagement process, and to commit to a long-term relationship. Again, these should be customised according to your business and/or clients' needs.

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CLIENT ENGAGEMENT PROCESS STEPS

The Client Engagement Process comprises six easy steps to help your advice business streamline your interactions and communication with your clients.

1.	**ENTICE**	Generating new business with your enticing offer to your target market
2.	**EXPLORE**	Making contact and exploring the client, the business, the value and the offer
3.	**DISCOVER**	Discovering the client's objectives, goals and issues and reconfirming the client experience
4.	**PROPOSAL**	Preparing and presenting the advice and understanding the proposal
5.	**FORMALISE**	Actioning the proposal and formalising the relationship
6.	**DEMONSTRATE**	Demonstrating you care through ongoing progression review meetings, reporting and communication

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CLIENT ENGAGEMENT PROCESS - TABLE OF TOOLS

The below tables lists the six steps of the Client Engagement Process and highlights the type of tools and templates included within each step, ready for your use.

1.	ENTICE	TOOL TYPE
Purpose	Generating new business with your enticing offer to your target market	
1.1	Offer to business owners	Marketing
1.2	Offer to CEOs and senior executives	Marketing
1.3	Offer to health care specialists	Marketing
1.4	Template offer using Business Owners as an example	Marketing

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2.	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

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2.	EXPLORE		TOOL TYPE
Purpose	Making contact and exploring the client, the business, the value and the offer		
	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

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3.	DISCOVER		TOOL TYPE
Purpose	Discovering the client's objectives, goals and issues and reconfirming the client experience		
3.1	**Discovery meeting client information pack**		
	3.1.1	Discovery meeting preparation guide	Client prep guide
	3.1.2	What to think about	Client prep guide
	3.1.3	Agenda for discovery meeting	Agenda
3.2	**Discovery meeting business information pack**		
	3.2.1	Checklist for discovery meeting preparation	Checklist
	3.2.2	Checklist for greeting potential client	Checklist
	3.2.3	Guide to discovery meeting	Team member guide
	3.2.4	What's important to the client information capture form (2)	Data collection
	3.2.5	Guide to reconfirming the value	Team member script
	3.2.6	Guide to explaining the process fees	Team member script
	3.2.7	Guide to explaining the next steps and agreement to proceed to the proposal stage	Team member script
	3.2.8	Agreement to proceed to the proposal stage	Agreement
	3.2.9	Confirmation letter of agreement to proceed to the proposal stage	Client comms
	3.2.10	Confirmation letter where recommendation is not to proceed to the proposal stage	Client comms
	3.2.11	Confirmation letter where the client decides not to proceed to the proposal stage	Client comms

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4.	PROPOSAL		TOOL TYPE
Purpose	Preparing and presenting the advice and understanding the proposal		
4.1	**Advice preparation**		
	4.1.1	Advice preparation checklist	Checklist
	4.1.2	Agenda for advice presentation meeting	Agenda
	4.1.3	Letter accompanying agenda for advice presentation meeting	Client comms
	4.1.4	Advice presentation meeting preparation	Checklist
4.2	**Advice presentation**		
	4.2.1	Guide to advice presentation meeting	Team member guide
	4.2.2	Checklist for greeting the client	Checklist
	4.2.3	Explaining the advice	Team member script
	4.2.4	Questions to ensure the client understands the advice	Team member script
	4.2.5	Explaining the next steps	Team member script
	4.2.6	Follow up letter confirming the client's options	Client comms
	4.2.7	Client engagement agreement	Agreement
	4.2.8	Confirmation letter of agreement to proceed to the formalise stage	Client comms
	4.2.9	Confirmation letter where the client decides not to proceed to the formalise stage	Client comms

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5.	FORMALISE		TOOL TYPE
Purpose	Actioning the proposal and formalising the relationship.		
5.1	**Advice implementation**		
	5.1.1	Letter detailing progress of advice implementation	Client comms
	5.1.2	Letter confirming completion of advice implementation	Client comms
5.2	**Building relations**		
	5.2.1	Ongoing contact and service delivery	Checklist
	5.2.2	Regular contact	Client comms

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6.	DEMONSTRATE		TOOL TYPLE
Purpose	Demonstrating you care through ongoing progression review meetings, reporting and communication.		
6.1	**Progress review meeting client information pack**		
	6.1.1	Letter accompanying progress review information pack	Client comms
	6.1.2	Request form to update personal/financial information	Data collection
	6.1.3	Progress review meeting client preparation guide	Client prep guide
	6.1.4	Agenda for progress review meeting	Agenda
6.2	**Progress review 'PR' meeting business information pack**		
	6.2.1	Progress review meeting preparation	Checklist
	6.2.2	Guide to progress review meeting	Team member guide
	6.2.3	Checklist for greeting the client	Checklist
	6.2.4	Follow up letter to progress review meeting	Client comms