

TOOL 2.3.12: Confirmation letter where recommendation is **not** to proceed to the discover stage | Exploratory meeting business information pack

PURPOSE: Client communication confirming the business recommendation that the potential client does **not** proceed to the discover stage. To be sent within 24 hours of the exploratory meeting.

**Client facing tool to be cut below the dotted line and embodied into personalised branded document*

.....

Dear<first name>,

RE: A more suitable option to help you achieve what you want

We enjoyed meeting with you today and gaining an initial understanding of what's important to you, the advice you are seeking and how we may be able to help.

As explained at the conclusion of our discussion, we do not believe we are the appropriate business to satisfy your current and future advice needs.<Add the reason/s why you chose not to pursue this relationship>

However, we do recommend one of our advice partner businesses, which are equipped to satisfy your immediate advice needs. Their contact details are:

<Advice partner business name>

<Address>

<Telephone>

<Email>

<Name of appropriate contact and position>

We greatly appreciate the opportunity to have met with you and trust your experience with <advice partner name> will assist your progress towards the solutions you are looking for. In the future if you believe we may be of assistance, we would be delighted to hear from you.

<Sign off>