

TOOL 2.3.13: Confirmation letter where the client decides **not** to proceed to the discover stage | Exploratory meeting business information pack

PURPOSE: Client communication confirming the potential client's decision not to 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: Confirming your decision not to proceed with our support

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 agreed at the conclusion of our discussion, you do not believe we are able to support you with your current and future advice needs. We believe we can only be of real value based on an ongoing long-term relationship, which is not what you are looking for <add any other relevant information based on the discussion>.

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>