**TOOL 2.3.2:** Checklist for greeting potential client | Exploratory meeting business information pack

**PURPOSE:** A checklist to be used by team members engaged in the greeting of a potential client prior to exploratory, discovery and/or advice presentation meeting.

**Business tool for internal use only (not for client use/view)*

## CHECKLIST FOR GREETING POTENTIAL CLIENT

### UPON ARRIVAL OF POTENTIAL CLIENT

- ☐ Team member at reception desk to greet potential client by name and introduces themself
- ☐ Team member at reception desk shows potential clients to meeting room and explains that they will inform the <adviser/s> of their arrival. Then ask the client if they would like any refreshments
- ☐ Team member at reception desk notes what refreshments the client requested in the CRM system/software
- ☐ Personal client manger and all other team members involved in exploratory meeting informed of potential client arrival and collect everything they need for the meeting (ie. client file)
- ☐ Personal client manager welcomes potential client and introduces themself
- ☐ Personal client manager invites potential client to watch a brief presentation introducing the business while refreshments are being arranged (if appropriate)
- ☐ Team member at reception desk arranges refreshments and delivers them to the meeting room. Potential client advised that the senior adviser and the associate adviser will join them shortly
- ☐ Senior adviser and associate adviser join potential client in meeting room, provide a warm welcome, introduce themselves and, together with personal client manager, commence discussion as per exploratory meeting agenda