

TOOL 2.3.5: Explaining the business and the value of your business | Exploratory meeting business information pack

PURPOSE: A team member script for the senior adviser in the exploratory meeting with the potential client. This is a guide to delivering the business story with an emphasis on how the client is the central focus of what the business does. The senior adviser should use these guidelines to develop their own presentation and script.

**Business tool that can also be a client facing tool if the client wishes to have a copy. Cut below the dotted line and embody into personalised branded document*

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EXPLAINING THE BUSINESS AND THE VALUE OF OUR BUSINESS

OUR MISSION - OUR PROMISE TO YOU

Our promise is that working together is all about you and helping you put in place a plan for a better life. Achieving this is central to everything we do. If we do not believe we can deliver this promise, we will not proceed to work together and will advise you of a more suitable alternative.

OUR CORE VALUE - ACHIEVING YOUR GOALS

The value we deliver is working together to help you get results that may be more difficult to realise if you did it yourself. We are committed to helping you achieve the things that are important to you, and sustaining them. We promise to always act in your best interests and to treat you and your money as if it was our own.

What you can expect from us is:

- Provide advice that is the most appropriate for your specific needs
- Ensure you clearly understand the advice and how we believe it will improve your situation
- Keep you informed of your progress towards achieving all your important milestones; and
- Evolve our relationship over the long term and provide ongoing guidance and support to get results that matter to you.

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OUR SUPPORT – HOW WE HELP YOU

We work together by:

- o Ensuring we have an in-depth understanding of what's important to you, your current circumstances and your future aspirations. This will provide us with the platform to design advice that's appropriate and in the order that is a priority to you.
- o Clearly explaining our advice and ensuring you fully understand it.
- o Meeting regularly and keeping you up to date on your progress (face-to-face, phone calls or otherwise) to ensure you stay on track and to provide solutions when you have strayed.
- o Keep you in the loop at all times. This involves keeping in contact and sharing important information, identifying relevant opportunities and keeping you abreast of what you need to know that may impact your ongoing future success.

QUESTIONS

Invite the potential client to raise any questions or discuss anything on their mind.

THINGS TO NOTE

Capture any important information that may require future action.