

EXPLORE

TOOL 2.3.6: Explaining the process | Exploratory meeting business information pack

PURPOSE: A team member script for the senior adviser to follow in the exploratory meeting with the potential client. This guide provides a framework for clarifying the experience a client will have from the enquiry stage to having a long-term relationship with the business. This should be used as a guide to develop your own personalised version.

**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 PROCESS- THE CLIENT'S EXPERIENCE

EXPLORE

Making contact and exploring you, the business, the value and the offer.

We are now in the exploratory stage of the process. This is where we have the opportunity to explore as much as possible about you, and assess if we are able to help you with your future planning and success.

We also encourage you to find out as much as possible about us. This stage is about both of us making an informed decision whether to proceed. The next step is what we call the discovery stage. This is where you have further opportunity to explain in more detail your current circumstances, financial position and your future aspirations.

As previously explained, today's meeting is at our cost. However if you decide to proceed to the next step *<there will be costs involved>*. We will outline exactly what they look like once we have a better understanding of how we can help.

DISCOVER

Discovering your objectives, goals, issues and reconfirming your experience

The discover stage is where we dig deeper and further uncover what you want to achieve, better understand your current situation, and gain clarity around your values and aspirations. As we continue to find out more about you, we will be in a better position to prepare the most appropriate advice to help you get the results you are looking for.

The discovery meeting normally entails a *<2>* hour appointment, where at the conclusion of this appointment we provide you with an indicative fee to go to the next step in the process.

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PROPOSAL

Preparing and presenting the advice and understanding the proposal

At the conclusion of the discover stage, we should be in a position to commence preparing your advice. There are a number of steps we follow in this stage and we will explain them in detail further down the track.

We may need to contact you during this stage in the process to verify information you have provided or to gather new information.

We will also provide you with an indicative timeframe, depending on what needs to be done.

We will deliver your advice in a simple presentation which will include:

- The key components of the advice
- Why this advice is appropriate for you
- How this advice will progress you to achieve your goals
- Some of the finer details that are relevant to your situation; and
- Any risks or concerns you need to be aware of relating to our advice.

All our advice is provide in writing in a document called a statement of advice. This provides you with the opportunity to review all the details of the advice at your convenience. Making sure you fully understand what we have proposed and why we have proposed it essential in the overall success of us working together.

FORMALISE

Actioning the proposal and formalising the relationship

At the conclusion of the advice presentation meeting, or shortly after, you will need to inform us of your intention to proceed. The step that follows is one of the most important, which is transforming the advice and recommendations into actions that will yield results.

Of course, you may have questions that need answering before this decision is made. It is a big decision! After your consideration and any further discussion, there may also be some refinements to our advice that are appropriate before we continue.

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DEMONSTRATE

Demonstrating we care through ongoing progress meetings, reporting and communication

Our role is to continue working together on an ongoing basis, to make sure you achieve all that is important to you well into the future. Planning is not a one-off event, it is an ongoing process. It involves continuous monitoring, tweaking, shifting and altering to stay relevant to the changing world we live in.

We will remain in close contact to ensure you remain on track at all times. There are a number of ways we do this, including:

- o Keeping you informed of your progress through reports, updates and commentary etc., where relevant at the time
- o Meeting with you on a regular <6 month> basis to discuss any changes to your situation, reconfirm or refine your goals and aspirations, and review how the advice and our recommendations have contributed to your progress and your ongoing success
- o Communicating with you regularly via email, telephone and our regular publications
- o Being available for you to call at any time to discuss your progress, any change in circumstance or anything else that is on your mind; and
- o Invite you to relevant events during the year which may be of interest.