

TOOL 2.3.7: Gaining agreement to proceed to the discover stage | Exploratory meeting business information pack

PURPOSE: A team member script for the senior adviser to follow in the exploratory meeting to gain agreement from the potential client to proceed to the discovery meeting. This should be used as a guideline to developing your own personalised version.

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

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GAINING AGREEMENT TO PROCEED TO THE DISCOVER STAGE

After the senior adviser has explained how they can be of value to the client and the process that needs to be followed, they need to assess if it's appropriate for the potential client to proceed to the discover stage.

DEMONSTRATE

Does the potential client's needs appear to fit the advice and what our business offers?

Rate from 1 (does not fit) to 10 (perfect fit) _____

From your initial understanding of the priority advice needs of the potential client are we equipped to deliver?

Rate from 1 (not equipped) to 10 (totally equipped) _____

Is the client's manner and personality an ideal fit for the business?

Rate from 1 (does not fit) to 10 (perfect fit) _____

Are there any other factors learned in the meeting that would indicate the client is a good fit (or not) for our business?

Rate from 1 (does not fit) to 10 (perfect fit) _____

Comments:

Please note: In the above assessment, if the 'rating' totals less than 19 points a recommendation that the potential client see an appropriate advice partner should be made. If the 'rating' total is 20 points or more, the senior adviser should continue to gain agreement to progress to the discovery meeting.

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DEMONSTRATE

Now with a basic understanding of your circumstances, your goals and what you believe are your priority needs for advice, we believe we can help you and invite you to proceed to the next step – the discovery meeting.

As explained, at this meeting we will have the opportunity to find out more about each other enabling us to determine whether we are in a position to deliver significant value and work together towards your ongoing success.

Also as explained, if you progress to the next step *<the investment you will need to make in your ongoing success is... outline your fees>*

Are you ready to proceed to the next step and keep progressing towards ultimately achieving the things you said are important to you?

IF THERE IS AGREEMENT TO PROCEED

I have really enjoyed our discussion today. As part of taking the next step, we need you to sign an agreement to proceed, obtain some additional personal and financial information and confirm a time and date for our next discussion.

I look forward to catching up again and continuing on this journey with you.

IF THERE IS AGREEMENT TO PROCEED

Discuss the reasons why the potential client has decided not to progress to the discovery meeting and address the issues raised.

Where there is no change in their decision, thank them for meeting with us, invite them to call you or the personal client manager if they have any queries or change their decision.

Let the client know you will be in contact again (if appropriate) in a few months.

Accompany them to the entrance/lift.