

**TOOL 5.2.1:** Ongoing contact and service delivery | Building relations

**PURPOSE:** A checklist to be used by team members engaged in the ongoing service and contact with the client. This checklist should be personalised and managed by the personal client manager.

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

.....

## **CHECKLIST FOR ONGOING CONTACT AND SERVICE DELIVERY**

### **IN THE INITIAL PERIOD OF THE CLIENT/BUSINESS RELATIONSHIP**

- Confirmation letter of agreement to proceed to advice implementation sent
- Letter confirming progress of advice implementation sent
- Letter confirming completion of advice implementation sent

### **EVERY THREE MONTHS ONCE ADVICE IMPLEMENTATION IS COMPLETED**

- Client to receive all newsletters, updates, offers, invites and proactive phone calls, etc. appropriate to their 'ongoing relationship and management offer' and your client communications calendar of events

### **EVERY SIX OR TWELVE MONTHS ON AN ONGOING BASIS**

- Letter detailing date/time options for progress review meeting sent
- Letter requesting update of personal/financial information in preparation of progress review meeting sent
- Agenda for progress review meeting sent
- Follow up letter to progress review meeting sent