

**TOOL 6.2.3:** Checklist for greeting the client | Progress review meeting business information pack

**PURPOSE:** A checklist to be used by team members engaged in the greeting of a client prior to the progress review meeting.

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



## CHECKLIST FOR GREETING THE CLIENT

### PRIOR TO THE ARRIVAL OF THE CLIENT

- Welcome card/sign for the potential client to be displayed in the reception area (if appropriate)
- Team member at reception desk to be briefed on the client's arrival

### UPON ARRIVAL OF THE CLIENT

- Team member at reception desk to greet the client by name and provides a friendly welcome
- Team member at reception desk shows the client to the meeting room and explains they will inform the adviser/s of their arrival. Offer the client a refreshment (referring to the preferences noted in the CRM system / software)
- All team members involved in the progress review meeting are informed of the client's arrival and they collect all information required ie. client file
- Team member at reception desk arranges refreshments and delivers them to the meeting room. Client advised that the senior adviser and the associate adviser will join them shortly
- Senior adviser and associate adviser join the client in the meeting room, engage in some light conversation and commence discussion as per the progress review meeting agenda