

Day 7 Agenda

<i>09:15 – 10:00</i>	Registration and Coffee
<i>10:00 – 11:00</i>	Review Of Progress From Day 6
<i>11:00 – 11:15</i>	Coffee
<i>11:15 – 13:00</i>	The New Client Engagement Process
<i>13:00 – 13:45</i>	Lunch
<i>13:45 – 15:15</i>	The New Client Engagement Process (Part 2)
<i>15:15 – 15:30</i>	Coffee
<i>15:30 – 16:45</i>	First Meeting Skills
<i>16:45 – 17:00</i>	Questions and Close

Internal Service Standard:

Although we promise a package of services to the client in our external service standard, internally this is what we need to do to deliver what we promised and to build regular contact with our key clients:

Client	Internal Service Standard
A Client	<p>1 x Annual Review Meeting pa - Standard agenda</p> <p>1 x Half-Yearly Review Meeting pa - Standard agenda</p> <p>Phone Call From Adviser In Alternate Quarters To Reviews (i.e. 2 pa)</p> <p>Corporate Hospitality (any of list below 1x pa) - Golf - Lunch - Football - Rugby</p> <p>Birthday Cards/Christmas Cards Client Newsletter/Email (specific and targeted) Investment Luncheon or Dinner (+ invite a friend along) Annual Client Seminar (all clients) Further Reviews At Client Or Adviser Discretion</p>
B Client	<p>1 x Annual Review Meeting pa - Standard agenda</p> <p>Phone Call From Adviser At Half Year Point Between Reviews (i.e. 1 pa)</p> <p>Corporate Hospitality (any of list below as and when for some B clients only) - Golf - Lunch - Football - Rugby</p> <p>Birthday Cards/Christmas Cards Client Newsletter/Email (specific and targeted) Investment Luncheon or Dinner for some B clients only (+ invite a friend along) Annual Client Seminar (all clients) Further Reviews At Client Or Adviser Discretion (if necessary)</p>
C Client	<p>1 x Annual Review Meeting pa - Standard agenda</p> <p>Generic Newsletter/Email</p> <p>Annual Client Seminar (all clients)</p>