Workbook Module 5

Interactive Worksheet

FP*advance*

1. Are you clear on what your aim is on the first phone call with a new lead?

2. Do you have a standard screening process for new leads into the business?

    - Which team member asks which questions of a new lead?

    - Has each team member received some basic training in how to handle any common issues?

3. Have you established guideline minimum criteria for new leads into the business? Are they being enforced?

4. Do you say 'no' to any clients that are clearly not 'on-target'? If not, why not?

5. Can all advisers handle "the fee question" if it gets asked on the phone prior to a first meeting?

6. Do you get all new clients to come to your offices for the first meeting?

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7. Do you get both members of a couple into your office for a first meeting?

8. Have you created a script that everyone uses to explain why meetings are held at your offices? Have you trained your team to provide this explanation?

9. Have you done your own 'walk-in audit' to see how a new client arriving at your offices might perceive you?

10. Are you clear on what your aim is for the first meeting?

11. Are you and your advisers aware of any 'Top 10 First Meeting Mistakes' that you can eliminate from your new client engagement process?

12. Have you created your own list of Interesting Questions?

13. Have you practiced the key questions in a no-pressure role play situation with your peers, husband, wife, boyfriend, girlfriend etc?

14. If not, can you schedule a couple of role plays just to get comfortable with the questions?