Review Meetings

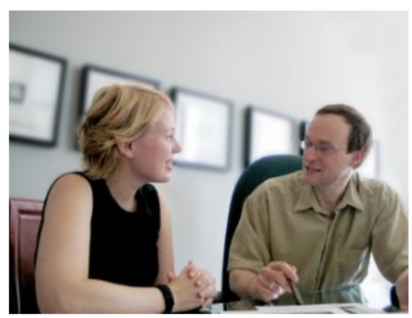
Core 4

When it comes to review meetings, there are several things you can initiate immediately to improve your client experience.

Structure & Professionalism

- Schedule Review Meetings proactively
- Always make a Review Meeting Confirmation Call the day before the meeting
- Be fully prepared ahead of time
- Carefully review their Client Profile so you can open the meeting warmly connecting on things that matter most to them
- Use an Agenda to signal the start of the meeting, as well as bringing structure and professionalism to your meeting approach
- Start your Review Meetings on time to be respectful of everyone’s time
- Never run late with your meetings or you may be inconveniencing your clients and making them late for other commitments they may have. As well, you don’t want to be late for your next meeting
- Have a debrief with your team to set advice and admin related follow-up items accordingly
- Deliver on what you promised to them in a timely manner

The Meeting Environment



It’s important you pay attention to the environment and surroundings your clients experience when they come in to meet you. Your professional office space should always be clean, organized and professional – and your client reception area should be warm and welcoming. This is where you can have reading material of interest to your clients – not just magazines about stocks and money.

A Warm Welcoming

When they arrive, make sure someone from your team gives them a warm and friendly welcome addressing them by name. In addition, if you document your clients drink preferences (think your high value clients only) you can immediately offer them their preferred beverage, which is always impressive to clients. If you need to hang up their coats, collect any umbrellas or validate their parking, do so in a manner that says you are more than happy to do so.

More About Review Meetings

We have an entire best practice devoted to Review Meetings later in the program, which you are welcome to review. However, many of the items contain pieces you may not fully understand until you complete the Client Onboarding and Client Rebranding portion of the program.