

Annual Service Call

Core 4

The Annual Service Call should be made by the Assistant and occur as a regular part of the ongoing servicing.

To create consistency, it should be made at the same time each year. Some teams prefer to spread these calls throughout the year for their various clients or power through them during the slower times of the year and get them done all at once. Either way is fine – it's whatever works best for your team.

The Annual Service Call should focus on basic ongoing services to see how things are going as well as, be used as a forum to communicate upcoming changes to clients – so they have some advanced notice.

We always encourage the person making this call to weave in the Client Profile information, where appropriate, to make this call a great experience for the high value clients.

We have provided a US Version and Canadian Version of this script to reflect some variances in specific language used.

Next Step → Go to this Best Practice online and print the version that best fits your practice.