

# Existing Client Flowchart

**Apply this process to each of your top clients.**

The Pre-Appointment process initiates the rebranding process. Your clients begin to experience firsthand the enhancements you have made.

## **Pre-Appointment**

This is a series of calls and written communication received by the existing client to set the stage for the 1<sup>st</sup> Appointment.

## **1<sup>st</sup> Appointment**

“Repositioning”

The 1<sup>st</sup> Appointment is a critical element in your rebranding efforts. It gives you and your client awareness about all aspects of your relationship. You will also share your Introduction Process

## **2<sup>nd</sup> Appointment**

“Implementation”

At the 2<sup>nd</sup> Appointment, you present your existing client with a tangible deliverable that provides great value and peace-of-mind—the PFO.

Client-centered follow up provides tangible anchoring for your existing clients to your rebranding process. This reinforces your new approach to managing your approach and clients.

## **Welcome Aboard!**

This is a series of actions to “re” welcome your top existing clients.