

Introduction Kit

The Introduction Kit is a key part of how you educate your prospects, existing clients and strategic partners. The contents of your Introduction Kit would be the same for each of these target audiences – the only thing that would change is the “Cover Letter” accompanying the kit to ensure it is appropriately referenced and framed.

The Professional Model

Building TRUST

Your Introduction Kit is specifically designed to lay the foundation for demonstrating your:

- Consistency
- Congruency
- Chemistry
- Accountability
- Integrity

It must be consistent with all other marketing materials you have, including your website. Pay careful attention to branding, formatting and language. Everything should look professional and put together.

The core contents of the Introduction Kit were covered in “Client Communication & More” and should be ready to use.

What NOT to Include

Do not include sales material and/or product brochures in your Introduction Kit. If you lead with product or performance, you are following the Sales Model and are on the road to gaining a customer-not a client. If you lead with process and people, you are following the Professional Model and are on the road to attracting a client – who will become an advocate. Avoid the temptation to ‘tuck in’ the readily available product pamphlets – this is a case where *less is more*.

When NOT to Send

We do not recommend sending out an Introduction Kit unless someone has given you expressed permission to do so (i.e., we don’t advise sending this out unsolicited). This information is intended for those who have expressed an interest in knowing more about your practice. In other words, they want to know more about you, your team and your approach.