

WORLD CLASS TRAITS OF FA TEAMS

60 Days of Client Service



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One of the keys to building a long-lasting relationship is getting that relationship off to a great start. If you build an extraordinary client experience from Day 1, your job will be a lot easier and you may well garner more recommendations and introductions. Here are two internal to-do lists for you or your sales assistant to work from after the account is opened.

Internal to-do list for welcoming new clients

- Send the new client the meeting agenda in advance and ask for approval and additions.
- Explain to the new client how our practice operates (processes, procedures, protocol).
- Tell the new client what licenses and designations we have and what our education and experience is, along with the potential benefits.
- Show the new client the technology (*i.e.*, how to access the account online, etc.).
- Start creating a list of the new client's favorites (movies, drink, food, etc.).
- Immediately send a handwritten thank-you note to the new client with a gift.
- Begin creating the family tree.
- Schedule two appointments for the investment professional to review the first two monthly statements when received.
- Follow up with a call two days later to see if there are any questions.

Internal to-do list for follow-up appointments

- When confirming the next appointment, remind clients where they should park.
- Always greet clients when they walk into the building and escort them to the office.
- Have the office or meeting place in impeccable order.
- Make sure the client's food or drink of choice is in place.
- After each meeting, review all the services provided and make sure the client is satisfied.
- Follow this checklist for every client meeting, no matter the tenure of client.

Remember: Be sure to follow your firm's approval process to obtain approval for any business-building ideas or marketing materials you would like to use with clients. Also remember to check with your firm's Compliance Department before initiating events to verify that the activity complies with firm policy and industry rules.



For help with this and any other business-building ideas, please call your MFS® partners at 1-800-343-2829 or +1 617 954 6450 (non-US).

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