

THE 3 KEYS TO A SUCCESSFUL APPOINTMENT

Send an agenda

The prospect or client needs to feel in control and aware. An agenda that starts with asking what they would like to accomplish will help them feel at ease and alert you to what is most important to them. The agenda should end by detailing action items or next steps that will be covered at your next meeting. This will demonstrate how you will continue to help them and will help increase their commitment to you.

It will also help them feel that they know what to expect and will demonstrate a level of professionalism that the client or prospect is not receiving from a competitor. We have sample agendas for every appointment at www.CustomerRounding.com

Identify their pain points

Otherwise known as agitators. What is their greatest financial fear? What keeps them up at night? What have they done to address this pain? Why have they not removed the agitation? How can you bring true relief to the pain?

The more your prospect or client talks, the better you are equipped to serve them. If you are doing most of the talking, especially about yourself or your firm, the less significant the client feels. To learn more about their needs you must ask probing, but not too personal, questions. For a guide to asking good fact-finding questions, request our white paper The Perfect Fact Find Question, or watch our video Opening Conversations On Income Planning.

Set a follow-up meeting

This by far is one of the most important aspects of the meeting, yet it is one that most advisors fail to do. The client or prospect should not leave the meeting without the next meeting being scheduled, even if it is the next quarterly or annual review.

If you fail to book the next meeting, especially with a qualified prospect, you are likely to lose future opportunities to convert that customer or prospect into a client. You will need to patiently and methodically lead your customer to a close.

At your next meeting, follow these three steps and you will dramatically increase your success.

For the tools and resources mentioned in this report call us at 1-800-639-2032

or email bianca@jegoss.com.

THE PRODUCERS FIRM

