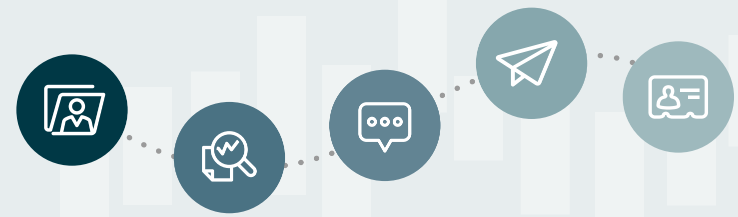
Client engagement process



A Client engagement process is a set of repeatable stages that you lead Clients through. Taking the time to define and write out your own process will enable you and your team to delight Clients and deliver consistent service.

Sharing an illustrated map of your process with Clients, prospects and centres-of-influence (COIs) has many benefits:

- It creates transparency around your process and helps Clients understand the value of your work.
- It minimizes uncertainty by letting prospects know what they can expect when working with you.
- It reinforces trust and confidence by explaining your process and then showing Clients that you follow through.
- It demonstrates that you're professional and experienced at what you're doing.
- It equips Clients and COIs with a tool to speak about your service to their personal and professional networks, which may lead to more referrals.

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Client engagement process

① Discovery

- Have a discussion to get to know the Client. Ask a lot of questions to help you understand their values and goals.
- Show active listening skills to build trust and comfort.

TIP: Read *A guide to a deeper Client discovery* to learn how to engage in deeper discovery meetings.

② Plan

- Prepare a holistic plan to address the Clients' needs and objectives.
- Highlight any team members or associates who may help in this process.

③ Recommendation

- Show the plan to the Client.
- Address concerns or barriers.
- Get agreement to the plan.

TIP: Use Client testimonials with Clients' consent to build confidence.

④ Implementation

- Put the plan in to action.
- Share it with any team members or associates who may help in the process or who work with the Client.

⑤ Stewardship

- Position yourself as a resource for both financial and personal life events.
- Offer value-add services like educational seminars, introductions to COIs (centers-of-influence) and Client appreciation tactics.
- Make each Client interaction remarkable. Ensure they get the attention they need from you and your team.

TIP: Use the Client service model to plan how you'll manage ongoing stewardship of Clients.

Build your Client engagement process map

1. Review the example on the next page.
2. Use the template on page 5 to build your own.
3. Define and describe your own unique process steps.
4. Include the timelines to set expectations on how long each step takes.
5. Take your template to a designer to create your unique process map.

Best practice

Take your Client engagement process map to the next level. Consider hiring a professional copywriter to create compelling descriptions and a graphic designer to apply your brand.

Share your Client engagement process map

You've put in the effort to create a Client engagement process map. Now's the time to showcase it.

Here's a few examples of opportunities to share your process:

- Introduce it in meetings with Clients, referrals, and COIs.
- Add it to your website.
- Pin it to your LinkedIn profile.
- Include it in the introduction to your webinars.

Best practice

Here's how to save the template as a PDF:

1. Save the PDF you filled out
2. Go to "File" > "Print"
3. Change Printer or Destination to "PDF"
4. Type the page number you want to save
5. Click "Print" to export the page

   Note: you will be prompted to re-save the file. Save it with a different file name than what you saved it as in step 1.

You never know how a prospect will find you.

Showcasing your Client engagement process map in multiple places may help Clients decide to contact you.

Platinum Financial Inc.

Creating wealthier Canadians

EXAMPLE

Client engagement process map

Help maximize and protect your financial well-being

We'll follow this approach to help you reach the financial goals you've set for yourself and your family.

Discovery	Plan	Recommendation	Implementation	Stewardship
Get to know each other through conversation and pertinent questions about your personal life, financial situation, and goals.	Work together to address your needs and objectives with the goal of preparing a holistic plan that tests for different scenarios. Discuss any team members or associates who might be helping in this process.	Review the holistic plan and explain the benefits, risks, features and cost of different solutions. Address all the questions or concerns you may have.	Discuss the services of any required or relevant professionals and implement the plan. Complete any applications and/or open accounts as outlined in your plan. Engage professionals to support the plan.	Continue to support your financial health and well-being through life-long partnership. Update the plan in preparation for, and response to, life events. Provide education and maintain open communication.
1-3 hours	1-5 business days	1-3 hours	1-12 weeks depending on complexity	Regular check-ins

At each stage, discuss any concerns and changes that may have occurred since last meeting and review any next steps.

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logo

Company name

Tagline

Title

Mission

Step name	**Step name**	**Step name**	**Step name**	**Step name**
Description	Description	Description	Description	Description
Timeline	Timeline	Timeline	Timeline	Timeline

Contact information and address