

The Essential Steps to Developing Advocates

IMPORTANT. READ THE FOLLOWING:

1. To turn your potential clients into advocates, you need to follow a consistent process. The following process outlines the series of mail outs, phone calls and meetings that we recommend you follow when a potential client is introduced to you.
2. You may wish to alter some of the steps. For example, you may not make the calls to confirm calls and instead just opt for the confirmation letter.
3. Be aware that the steps of this process are proven to work. Consider carefully any changes you desire to make. Missing steps or altering order may detract from your end result.
4. When complete put this process in your Procedures Manual.

The Essential Steps are:

1. Mail a Referral Thank You Note to the current client or center of influence who recommends a potential client to you.
 - a. Visit the [Advocate Mall](#) for a selection of quality cards.
2. Call potential client to introduce yourself and book 1st Appointment.
 - a. Let them know you have a process for bringing on a new client.
 - b. The first step is to send out an Introduction Kit.
 - c. The next step is for them to be contacted to arrange a first appointment.
 - d. The first appointment is to determine FIT: am I right for you and are you right for me.
 - e. After that you can mutually agree if there is a reason to proceed.
 - f. Let them know you will mail an Introduction Kit.
3. Mail Introductory Kit (with cover letter, handwritten note and envelope) to potential client.
4. Send confirmation note or letter for 1st Appointment.

5. Make confirmation call for 1st Appointment.

6. 1st Appointment
 - a. Agenda
 - b. Introduction
 - i. About Me and About My Company
 - ii. Compensation
 - iii. Recommendation Process
 - iv. Promise Statement
 - v. What's Important to You?
 - vi. Is there a fit?
7. Make Is there a fit? call.
8. Mail 2nd Appointment confirmation: Letter and Checklist.
9. Make confirmation call for 2nd Appointment.
10. 2nd Appointment
 - a. Agenda
 - b. Introduction
 - c. Make 3rd Appointment.
11. Make confirmation call for 3rd Appointment.
12. 3rd Appointment
 - a. Agenda
 - b. Present Promise Statement
13. Make confirmation call for 4th Appointment. (Optional)
14. 4th Appointment (Optional)
 - a. Agenda
15. Mail Welcome Card.
 - a. Visit the [Advocate Mall](#) for a selection of quality cards.
16. One week after 3rd/4th appointment: mail Welcome Letter.

17. Two weeks after 3rd/4th appointment: mail Letter & Anchor.

18. After the client receives their first statement/bill, have your assistant call to review it with them.