

# 1<sup>st</sup> Appointment Outline – Introduction to Their Team

This “informal” appointment focuses your energies on your potential Strategic Partner, their processes, and their place of business. Imagine you are one of your ideal clients, and you are visiting this professional for the first time. Soak in the experience, and grade it accordingly. Your observations should include ALL aspects of the experience of visiting this professional, right down to things like how easy it is to park, the cleanliness of the building, the way you are greeted by staff, and the rapport (or lack thereof) that the potential Strategic Partner and staff exhibit etc.

Although it would be inappropriate for you to provide an agenda at this meeting at their office, we are going to list out some questions you may want to ask of your potential Strategic Partner. Use this as an outline. Feel free to add questions that aren't here, especially as it relates to their specific profession. Of course, you can disregard the questions which aren't pertinent to you. Be friendly, genuinely interested, and upbeat, but also be thorough. Ultimately, an introduction to this professional, and the client's experience with them, will reflect on you.

## Questions You May Want to Ask Your Potential Strategic Partner

### Background

- Their general background.
- Their experience, education, and their professional accreditations.
- The team of individuals who support them and describe what they do.
- How long they've been in that location and if they have any other offices.
- Whether there is any promotional material you can review.
- What their website is designed to do.

### Ideal Client Profile

- Their business model and their process by asking about their Ideal Client. If they are selective about who they take on as a client, this is a good thing!
- Their capacity, and whether they have the means to take on new clients.
- Their knock-out factors, or things that would rule out someone from becoming a client.
- How they are compensated and ask at what point do they explain how they are compensated to a prospective client.

## **Their Approach**

- What happens when they meet with a prospective client for the first time. You can also establish if they have any pre-appointment steps before that first meeting with a prospective client.
- The onboarding process they use when Fit has been established with a new client.
- Their Implementation Process with a new client. This includes things like establishing if there is a data-gathering phase and how this is accomplished. You can also find out how many meetings a new client can expect, and what deliverables (if any) the new client receives.

## **Client Welcome**

- If they have a Welcome Process after they have onboarded and begun implementation with a new client.

## **Ongoing Service**

- Their ongoing service deliverables that have to do with implementation throughout the calendar year as it relates to the provision of their service.
- Whether they have a consistent Service Matrix
- Whether they have any 'surprise and delight' moments that occur over the calendar year. This might be a Thanksgiving or Christmas tradition, marking Birthdays, or Moments of Truth, or Client Events

## **Other**

- Whether they have any other professional partners, networks or alliances that may be helpful for you to know more about.
- Their general community involvement and philosophy around giving back.
- If there is anything else, you need to be aware of that may affect their client experience.
- If there are any immediate changes expected related to their team, location, or services.