The Anatomy of a Great Meeting

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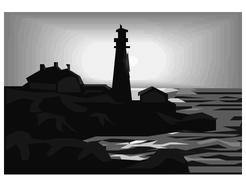

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The 6-Step Meeting Model

1. Strategic Preparation
2. Set Purpose
3. Review and Renew
4. Establish the Action Plan
5. Completion
6. Follow through and follow up

1. Strategic Preparation

Get excited about the client's opportunities!

- Strategic Calendaring
- Letter and Meeting Form (initial/update)
- Gather and Review Data
- Agenda email with questions
- Value Call
- Strategic Team Meeting
- Prepare Plan/Set Intention
- Prepare Meeting Materials
- Creating the Space -
  - Physical Environment
  - Your Intention and Presence

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2. Begin the Meeting by Setting Purpose and Value

Get the clients excited about their opportunities!

- Check in:

  How is your day?

  How is your time?

  Your comfort?

- Create value around your preparation and enthusiasm

- Flush out the clients' agenda FIRST
  - Separating discovery from solutioning

- Review your agenda for the day

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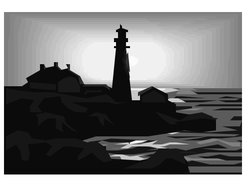

2. Setting Purpose

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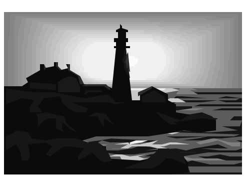

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2. Setting Purpose

Discovery

- What's up in their lives?
- Painting the "picture on the box top"
- Learnings? Shifts? Experiences? Stories? Upcoming events, Transitions? Longings? Obstacles?
- Expectations, defining success/Satisfaction with their progress
- Inventory of resources

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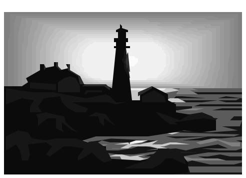

Inventory of Resources

- Financial
- Emotional
- Health and health care
- Intimacy and alignment
- Social, family
- Geographic/environment
- Professional /work

- Vigor
- Meaning and purpose
- Resourcefulness
- Resilience
- Human capital (skills, education, experience)
- Knowledge, awareness and wisdom
- Time

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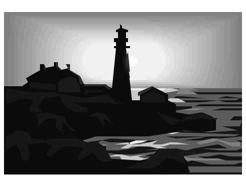

Discovery

The foundation for relationship, inspiration and action.

- Gives us critical insight into our clients' experiences, expectations, beliefs, fears, challenges, strengths, dreams and understandings
- Serves the highest goals of the client
- Provides a touchstone
- Offers clarity
- The springboard for getting agreement and action for results

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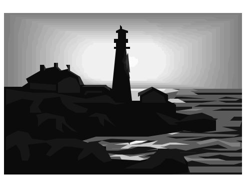

3. Core content - general guidelines

Create value, focus and momentum

- Weave discovery into financial planning issues
- Demonstrate listening
- Collaborate
- Observe
- Analogy and stories create connection and learning
- Scenario planning and decisions
- Set priorities
- Get agreements
- Ask questions

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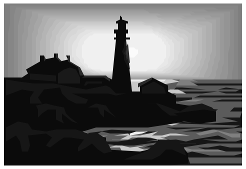

3. Core content (review & renew in an annual meeting)

Create value, focus and momentum

- Reflect on the issues, conversations that you were engaged in throughout the year
- Financial statements update
- Audit of plan: goals vs. actual progress
- Review and renewal of investment policy and performance
- Review and renewal of financial policies and planning update items
- Scenario planning and decisions
- Set new priorities
- Guidance and agreeements

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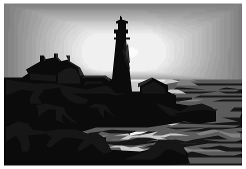
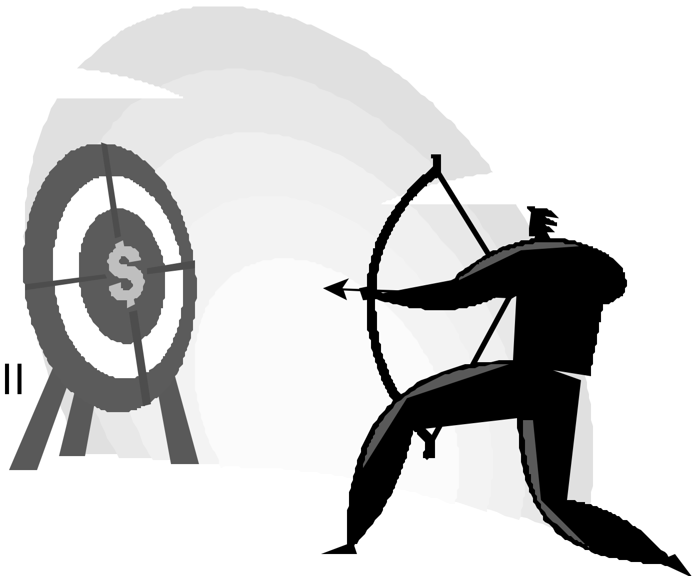


4. Establish the Action Plan

Create alignment, accountability and movement

- Outline steps and actions to further success and meet goals.
- Get agreement on action plan.
- Appoint, assign and calendar.
- Update expectations and discuss how success will be measured.



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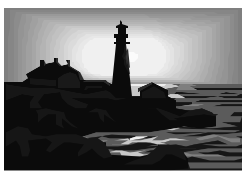

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5. Completion

Clarify, Confirm and Celebrate

- Review their agenda items and flush out any incompletions
- Summarize the meeting, the decisions and action plan
- Celebrate the accomplishments and client strengths
- Ask for feedback and clients’ appreciative take-away
- Schedule next contact
- Anything else?

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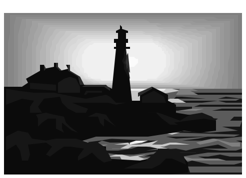

6. Follow Through and Follow Up

Demonstrate value through timely completions and thorough communication

- Team Debrief
- Compose Meeting Notes
- Complete Action Items
- Communicate to Client
- Document

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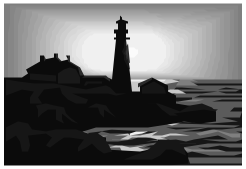

Tool Kit

- Meeting Client Questionnaire
- Value Call Checklist
- Meeting Prep Guideline
- Meeting Agenda Email
- Meeting Deliverables
- Summary Meeting Notes
- Checklist of Financial Planning Modules
- What else?

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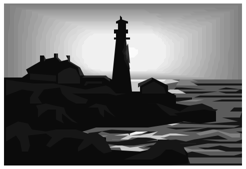

Summary Letter Building

→ Make a stepping stone path from discovery to planning

→ Identify how to demonstrate a colourful, high impact follow through with a summary letter

→ Differentiate your practice with qualitative, written follow through

→ Solidify future client commitment and accelerate pace in the progression and expansion of the relationship

→ Increase the clients' concrete sense of value and vocabulary to describe it in making referrals

→ Make it real and make it yours… not technique but a professional way of providing valuable service every day

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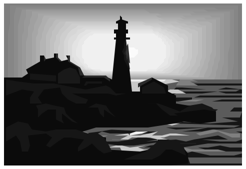

Summary Letter Purpose

- Demonstrate your listening and understanding of client's priorities, concerns and needs
- Demonstrate personalized, individual care
- Create possibilities and help achieve them with solutions
- Pattern building and consistency
- Deliver addition value, what the client wants

1. Maximize productivity… "I need to be in more than one place at a time"

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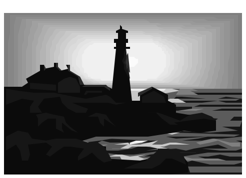

Summary Letter Components

1. Warm style
2. **Current Situation**

   Life, Family, Work, etc.
3. **Priorities: recap their agenda, concerns**

   Demonstrate or seek further knowledge of client priorities
4. **Goals & Objectives**
5. **Challenges**
6. **Core conversation recap**

   Use client's words; reflect understanding
7. **Criteria**
8. **Next Steps & Timetables**

   Precision about their timetable gives you a foundation to accelerate

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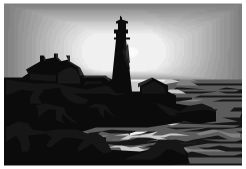

The Right State of Heart and Mind

Be prepared

Be intentional

Be interested

Be Present

Be Complete

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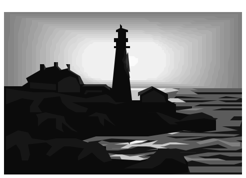

So, Now What???

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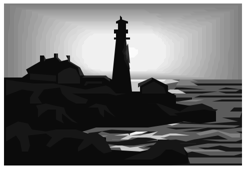

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What will you do tomorrow?

What one thing could you do that will have the most dramatic impact on your clients' success?

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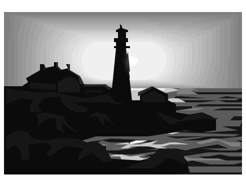

- Are you offering “a Plan” or “Planning?”
- What model of planning works for you and your clients?
- What process is most likely to lead to your clients’ success?
- Are you committed to financial planning?
- What have you learned over the last 12 months?
- What questions are stirring?

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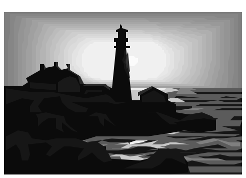

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Each planner’s focus:

- Your own clear vision and purpose that is client-centered
- What is the client experience and value you want to deliver?
- Systemize your process and deliverables
- Be a mentor to your team, a model for your clients
- Be authentic and courageous and true

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