Sample Process Template

Process: Discovery Meeting Process

Description: Use this process to prepare for, execute, and follow-up after a 1st appointment (Discovery Meeting) with a prospect

Category: Leads & Prospects

Keywords: First Meeting / Initial Prospect Meeting / Discovery Meeting

Last Updated: 5/12/2020

Locations Referenced:

- CRM – Workflow – Discovery Appointment

PROCESS DETAILS:

STEP #	WHAT	WHEN	WHO
1	Enter prospect data in CRM system	As soon as lead is received	Front Office Associate
2	Call prospect to schedule Discovery Meeting	As soon as lead is entered in CRM	Front Office Associate
3	Enter meeting on CRM calendar	Immediately after scheduling appointment	Front Office Associate
4	Send meeting confirmation email with agenda and confidential profile form	Immediately after previous step	Front Office Associate
5	Schedule reminder call for 24 hours before appointment	Immediately after previous step	Front Office Associate
6	Change prospect opportunity status to "Discovery"	Immediately after previous step	Front Office Associate
7	Prepare Discovery meeting materials; deliver to advisor	1 week before appointment	Front Office Associate
8	Add any information prospect returns to CRM/prospect file	Prior to appointment	Front Office Associate
9	Review prospect information in CRM	48 hours before appointment	Advisor
10	Complete appointment reminder call	24 hours before appointment	Front Office Associate
11	Welcome prospect with preferred beverage (if known)	Time of appointment	Front Office Associate
12	Schedule Proposal meeting	During appointment	Advisor
13	Enter meeting notes in CRM	Within 24 hours of appointment	Advisor

14	Provide prospect folder to Front Office Associate	Within 24 hours of appointment	Advisor
15	Update prospect opportunity status in CRM	Within 24 hours of appointment	Advisor
16	Upload prospect information to prospect folder	Within 24 hours of receiving folder	Front Office Associate
17	Send follow-up letter	Within 24 hours of appointment	Front Office Associate
18	Kick off Proposal Meeting process workflow	Within 24 hours of appointment	Front Office Associate
19	Enter data gathered into CRM	Within 24 hours of receiving prospect folder	Paraplanner
20	Enter data gathered into financial planning software	Within 48 hours of receiving prospect folder	Paraplanner
21	Schedule time to review plan with Advisor	Within 48 hours of receiving prospect folder	Paraplanner
22	Follow up with prospect for any missing information	Within 48 hours of receiving prospect folder	Paraplanner