**Sample Process Template**

**Process:** Implementation Meeting Process

**Description:** Use this process to prepare for, execute, and follow-up after a 3rd appointment (Implementation Meeting) with a prospect

**Category:** Leads & Prospects

**Keywords:** Third Meeting / Proposal Meeting

**Last Updated:** (Date) **Updated By:** (Name)

**Locations Referenced:**

* CRM – Workflow – Implementation Appointment

**PROCESS DETAILS:**

|  |  |  |  |
| --- | --- | --- | --- |
| STEP # | WHAT | WHEN | WHO |
| 1 | Submit paperwork request to operations team | At least 48 hours before meeting | Advisor / Paraplanner |
| 2 | Send email appointment reminder | 3 days before the meeting | Front Office Associate |
| 3 | Call to confirm appointment | 24 hours before the appointment | Front Office Associate |
| 4 | Review prepared paperwork for accuracy | 24 hours before the appointment | Paraplanner |
| 5 | Prepare any additional materials requested by advisor | 24 hours before the appointment | Paraplanner |
| 6 | Welcome prospect with preferred beverage (if known) | Time of appointment | Front Office Associate |
| 7 | Conduct Implementation Meeting and schedule the Allocation/Review Meeting (if necessary) | During meeting | Advisor |
| 8 | Enter notes into CRM system | Within 24 hours of appointment | Advisor / Paraplanner |
| 9 | Return paperwork to operations team | Immediately following appointment | Advisor / Paraplanner |
| 10 | Start Client Onboarding process workflow | Immediately after receiving paperwork | Operations Associate |