

# Sample Process Template

**Process:** Proposal Meeting Process

**Description:** Use this process to prepare for, execute, and follow-up after a 2nd appointment (Proposal Meeting) with a prospect

**Category:** Leads & Prospects

**Keywords:** Second Meeting / Proposal Meeting

**Last Updated:** 5/14/2020

**Locations Referenced:**

- CRM – Workflow – Proposal Appointment

## PROCESS DETAILS:

STEP #	WHAT	WHEN	WHO
1	Enter data gathered into CRM	Within 24 hours of receiving prospect folder	Paraplanner
2	Enter data gathered into financial planning software	Within 48 hours of receiving prospect folder	Paraplanner
3	Follow up with prospect for any missing information	Within 48 hours of receiving prospect folder	Paraplanner
4	Schedule time to review plan with Advisor	Within 48 hours of receiving prospect folder	Paraplanner
5	Schedule reminder call for 24 hours before appointment	Immediately after previous step	Front Office Associate
6	Change prospect opportunity status to "Proposal"	Immediately after previous step	Front Office Associate
7	Prepare Proposal meeting materials; deliver to advisor	1 week before appointment	Front Office Associate / Paraplanner
8	Add any information prospect returns to CRM/prospect file	Prior to appointment	Front Office Associate
9	Review Proposal	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 Implementation 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	Start Implementation Meeting process workflow	Within 24 hours of appointment	Front Office Associate