

CLIENT LADDER

'Hello _____ . It's _____ calling. How are you etc.'

'The reason for my call is that I would like to meet up with you, maybe for a coffee during the day, to discuss ways in which I can provide an even better service to you, as one of my most valued clients, whilst, at the same time, you help me to grow my business. So, when can we meet?

[Any questions at this stage should be deferred until the meeting. Remember: there is no reason why they should not agree to meet since you are not trying to sell them anything and the meeting is just a brief conversation to discuss your ideas.]

'Thank you for seeing me etc.'

'The reason for wanting to see you is to put a proposal to you which I think will give you the level of service you need – and probably want – whilst at the same time ensuring I have sufficient time to make that commitment. Obviously, if I am not spending most of my time looking for new clients I can spend it with my best clients. So what I'm asking is for your help in reducing those time constraints by introducing me to people you know [stipulate your criteria: high net worth, business people etc.] Would you be happy to do that, given our established working relationship? [Get a 'Yes'.]

Great. So shall we talk about a few of them now?'

[Get names, details, numbers. If not available, say you'll call in a couple of days to get the details. Finally, agree a service plan with your client]

Every Success

www.sandroforte.com