

Turn your new clients into loyal fans...from the start



The first interactions you have with your clients can make or break your future relationship. We're here to help you create the "MVP" experience.

Let's get started!



#1 Deliver a memorable onboarding experience

- **Take the quiz** on page 2 to help you identify strengths and weaknesses of your new client onboarding process.
- **Create a welcome kit** to help your client feel like the MVP of your firm's family. Consider including items like:
 - *A personalized welcome letter* recapping things you've discussed, next steps, ways you'll support them as a key resource, services offered, and how they can reach you.
 - *A client intake form* to capture personal and professional information.
 - *A team introduction piece* highlighting each person in your firm, including their knowledge base, professional skills, and a "fun fact." Be sure to keep it high-level and friendly!
 - *A next steps flyer* with a personalized list of items the client will need to complete—paperwork, communication preferences, etc.

#2 Stay top of mind

- **Connect on social media** like LinkedIn¹ to help create strong bonds with new clients, and show what makes you ... you. Showcasing your community involvement, family, awards, and hobbies in a professional way can help strengthen connections. **Make it a priority to ask if you can connect.**
- **Send out a schedule of upcoming events.** Sharing event opportunities is a good way to connect with new clients and their families/friends.
- **Write and mail a personal thank-you note.** A handwritten, personalized note is a special way to show your new client that you value their business.

#3 Show you go above and beyond

- **Schedule a new client online account overview meeting.** Navigating online accounts can be tricky. Help walk them through getting logged on and where to go to view key information.
- **Help walk new clients through their first statement.** Statements can be confusing, and helping them understand where to find key information shows you deliver exceptional service and that you and your staff are available to help.
- **Ask permission to contact your client's other trusted advisors.** By showing you're willing to work with their team of professional advisors—CPA, attorney, insurance agent, etc.—you can better align with their entire financial picture.
- **Invite your new client and their family/friends to dinner.** Treating them to dinner can show that you value your relationship and want to build on it.

Continue to the quiz >

Quick quiz:

Does your new client onboarding process help clients fall in love with your firm?

Take this quiz to find out.

- 1 Have you formalized your new client onboarding process—in writing—with specific tasks assigned to each member of your team? Yes No
- 2 Do you have a new client welcome packet (that is different from your firm’s prospect or marketing kit)? Yes No
- 3 Does your welcome packet include a form that requests details on a client’s financial picture beyond the account they just opened with you? Yes No
- 4 Do you give new clients a “team members introduction” page featuring a short bio and contact information for members of your staff? Yes No
- 5 Have you prepared a detailed list of services document that illustrates the many ways you can help the new client reach their financial goals? Yes No
- 6 Do you conduct welcome meetings (either online or in person) with each new client? Yes No
- 7 Do you send personal, handwritten thank-you notes welcoming a new client to your firm? Yes No
- 8 Do you send new clients a next steps outline to follow up on previous discussions and help keep them focused on outstanding items? Yes No
- 9 Do you ask new clients if you can connect with them on social media? Yes No
- 10 Do you call new clients to walk through their first statement with them? Yes No
- 11 Do you remember your new client’s personal interests and hobbies? Yes No
- 12 If the new client came from a referral, do you surprise the referral with a handwritten thank-you note? Yes No
- 13 Do you ask new clients for permission to introduce yourself to their certified public accountant, attorney, insurance agent, or other centers of influence (COIs)? Yes No
- 14 Do you hold review meetings with new clients approximately 45 to 60 days into the relationship to follow up on outstanding business, answer questions, and help get them acclimated to using online account services? Yes No
- 15 Do you invite new clients to lunch or a dinner for a one-on-one celebration of your new relationship? Yes No

How did you do?

✦ If you answered “Yes” to most questions, congratulations! You’ve built a solid onboarding process. On the other hand, if you found yourself answering “No” to some of these questions, it might be a good idea to brush up on extra touchpoints that could help take your onboarding process to the next level. Check out the new client 60-day checklist on page 3 to get started.

Continue to the 60-day checklist >

New client 60-day checklist

To help plan your outreach over the first two months, use this 60-day checklist as a guide:

day
1

Account opening

- Get started strong and give or send a welcome kit. Be sure to highlight what makes you and your firm stand out.

day
2

Welcome call/connect online

- Give your new client a call or connect on social media to personally welcome them to the firm.

day
5

Hold a client welcome meeting

- Take the time to introduce your team so your new client and your staff can get to know each other.

day
10

Transaction verification call/send thank-you note

- Call to confirm transactions and be prepared to answer any questions they may have.
- Hand write and send a personal thank-you note.

day
30

First statement follow-up

- Call to walk through the first statement with your new client (if applicable), and offer to answer any questions they may have.
- Invite them to any upcoming events, and thank them again for doing business with your firm.

day
45

Review meeting

- Go over your new client's account.

day
60

Referrals and introductions

- New clients can be some of your best promoters. Ask if they have friends or colleagues who might benefit from the services your firm offers.

Treating new clients like the "MVPs" of your firm can be a successful way to build and retain your book of business. The secret to success is all about anticipating questions, so your team can deliver "just in time" service, while incorporating personal touches to make every new client feel like the MVP.



Want to discuss ideas?
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