New Client Contact Policy

We all understand how much work it takes to add new clients. We are responsive and available immediately as we try to sell our service. There is nothing worse than Debbie working hard to get a client to only lose them because we dropped the ball. If feels like a bait and switch to the client and that is not who we are!! This policy is used to make sure this does not happen.

Here are the events to make sure we get these clients off on the right foot.

1. Sam sends docs out, copies Nui tom Debbie administrator

2. Admin calls. Leaves at least 2 messages. If contact is made, Administrator sends follow up email like Ann's and Plan overview form. Copies Tom Nui Sam Debbie and financial planner and CPA.

3. If unable to contact client. Sends email. Copies Tom Nui Sam Debbie and financial planner and CPA.

Sample nonresponsive email

Dear.

I have left two messages for you. I wanted to introduce myself as your new plan administrator.

My name is
You can reach me at

If there is someone else in your office you would like me to work with, please let me know their contact information and I will touch base with them.

Going forward, I will be your primary contact regarding your plan. I look forward to working with you.

Please remember to sign your documents and return per Samantha's instructions.

Sincerely...

4. Once administrator contacts client, they get CPA and financial planner information, as needed, and forwards to Sam for BCM

5. If no response to Administrators email after 1 week. Debbie calls leaves message that new administrator is. Follows up with email. Copies Tom Nui Sam Debbie and financial planner and CPA.

Sam follows up on signed documents.