

## Ten Minutes to Much More Effective Client Meetings

By Dan Richards

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Given the importance of client reviews, advisors should always be alert for ways to make them more effective. Recently, I spoke to an advisor who made a simple change to meeting agendas and saw a significant improvement as a result.



First, let's review some ideas to make meetings more productive that I've highlighted in past articles:

- Write down key objectives in advance of meetings
- Use agendas to keep meetings on track and improve the sense among clients that they're getting value from the time invested
- Use research on what leads to positive recollections of experiences – and ensure you end the meeting on a high note
- Employ technology to make telephone meetings look and feel more like face-to-face meetings
- Kick off your meetings with a strong question to engage clients

### Starting meetings by engaging clients

Last year, this advisor started using meeting agendas, employing a three-step process that I laid out in one of my articles:

1. When setting up the meeting, start by asking clients about any questions they'd like to cover, and then mention the items he wanted to cover.
2. Follow up with an email to clients with the agenda that arose from this conversation.
3. When he sitting down with clients, have the agenda include all the items they'd discussed moved down one spot, with the first item blank.

He'd start meetings by saying:

*"Here's the agenda we agreed to, but you'll notice the first item is blank. That's in case anything's come up since we spoke that you'd like to talk about or in case we've missed anything."*



Then he'd go on to say:

*"What is there that we should talk about today that's not on this agenda?"*

Most of the time clients answered that there was nothing else, that everything was on the agenda. Even so, there was benefit in engaging clients right off the top and letting them know that this was their meeting, not his. But occasionally, clients would raise important issues that would not have come up otherwise.

### **Helping clients stay focused**

Even with this strong start, this advisor found that clients would sometimes lose focus during meetings. Further, clients would often walk away from meeting and then forget what they covered shortly afterwards.

As a result, he made a simple change that has helped address these problems.

He still prepares an agenda in advance of meetings, but now he takes 10 minutes beforehand to add two or three bullet points under each agenda item, summarizing the key points he's making. Now when clients sit down, they not only have a list of items that will be covering in the meeting but a cheat sheet of the key points under each item.

Two positive things have happened as a result of this.

First, this has helped keep clients on track and maintained their attention. It's like the difference between being at a talk in which the speaker is delivering her message verbally as opposed to having a presentation to reinforce key points and a handout with which to follow along.

Second, he's found that client retention of key points covered in the meeting has become much better. In essence, he's supplied clients with meeting notes that they can use to follow during the meeting and to take away afterwards.

While filling in key points on the agenda for client meetings worked for this advisor, it may not work for you. But give this a try in an upcoming meeting and see if it adds value – the only way to improve is by being open to new ideas and approaches, integrating the ones that work into your process, discarding the ones that don't.



*[Dan Richards](#) conducts programs to help advisors gain and retain clients and is an award winning faculty member in the MBA program at the University of Toronto. To see more of his written and video commentaries, go to [www.clientinsights.ca](http://www.clientinsights.ca). Use A555A for the rep and dealer code to register for website access.*

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