

Creating a Platinum Workspace



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Here is a sample checklist with ideas gleaned from other top sales teams to help you review your own client experience.

Curb appeal and first impressions

- Do you need to call clients and remind them where to park?
- When a client approaches the outer door to your building/office, how does it look? Could you add appeal? (e.g., flowers, etc.)
- Do you greet clients at the front door of your building if you have security?
- What does your office area look, sound and smell like when someone first enters? Is it inviting?
- Is there a TV in the reception area? If so, is it tuned to a calm and interesting channel rather than financial news? Or perhaps to a “Welcome” message for incoming clients?

The waiting area

- Does it convey an air of competence? Is it organized and clean? Is it professional-looking?
- Is it comfortable? Are the client chairs well positioned and the waiting area clean and interesting?
- Is it welcoming? Do you offer something to drink, and do you serve coffee/soft drinks in a nice glass?
- Are there appropriate reading materials? (Discuss what’s “appropriate” as a team.)
- Do you have a spreadsheet of all the client’s favorites? (e.g., drinks, treats, etc.)

In the financial professional’s office

- Is the office furniture set up in a way that is comfortable for clients, especially older or physically impaired clients?
- Is the desk positioned so that the window is not directly behind the financial professional? (Light from the window can make it hard for a client to see the financial professional’s face or eyes.) If you can’t move the furniture, is the window covering “friendly” to older clients? (Or do Levolor-style blinds block light and make reading difficult?)
- Is there a desktop lamp in addition to, or instead of, overhead lighting?

Additional resources to make appointments more effective

- How would the client assess your reading materials? Are how-to-sell books on the shelves or credenza, or are there family finance, multigenerational financial planning and retirement income management resources in view?
- Does the financial professional’s office create an air of organization, or are there piles of papers, etc.?
- Do you provide paper, a soft gel pen and a desktop calculator with large buttons and a large-digit display?
- Do you have a supply of drugstore reading glasses for those who forget their own?
- Do you set an agenda ahead of time? Do you send it to clients prior to meetings for any additions?
- Do you have a large screen TV or monitor available to display online presentation materials?
- During long meetings, do you invite clients to take a break to use the rest room and to consult privately with one another?
- Are business cards within easy reach?
- Do you explain what your designations mean to the client?



Remember: Be sure to follow your firm’s approval process to obtain approval for any sales ideas or marketing materials you would like to use with clients.

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For help with this and any other business-building ideas, please call your MFS® partners at 1-800-343-2829 or +1 617 954 5000 (non-US).

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