CREATING A PLATINUM PRACTICE

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?

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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.

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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