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Value Check In – Sample Script

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Of all the referral tactics I teach, the most important one is that of checking in with your clients on a regular basis to make sure you have a happy client and they are seeing the value. And remember, you want to engage in these value discussions whether you intend to ask for referrals or not.

I have no canned value questions because it depends so much on the situation. What you say early in the relationship will vary from what you say at the delivery of a plan, from what you will say a year or more into the relationships. The most important thing is that the words are genuine and comfortable for the advisor, and that the questions are open-ended in nature. With that said, here are a few possibilities:

Early – first appointment or so:

1. What's the most important thing we discussed so far?
2. How are we doing so far? Are you finding this information helpful? Tell me about it.

After delivery of a plan or policy:

1. We've been through a process, have we not? I've asked you a lot of questions and here is the fruit of our labor – so far. Please tell me about what value you feel this process has given you.

1 or more years into the relationship:

1. Let's put the market aside for a minute and talk about the things we can control – our relationship and our communication. First, is there anything that's not working for you in this area? Anything you think we need to improve upon? Shifting gears, what has been working for you? What do you like about our relationship and the work we've been doing together?

   (Always begin with the "what needs improvement" side of the discussion. If there is something that needs to be fixed or merely vented, then you want to get that up and out. Plus, it's easier to ask for referrals, or even just plant a seed, when you transition from what is working in the relationship.)

TIP #1: With your long-term clients, when you confirm your review appointment, let them know that you'll be checking in with them about how the relationship is going. They will appreciate this "heads up."

TIP #2: With your new clients, let them know that one thing they can expect from you is that you will be checking in with them from time to time to make sure that everything is being communicated and that they are seeing the value of the relationship.

Remember! Your minimum behavior for the rest of your career… After meetings of any significance with your clients, always do a value check in and plant a referral seed (or ask for referrals).