

CAPTURING & CONVERTING ONLINE LEADS

Adam Cmejla's Behind-the-Scenes Tour



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integratedpwm.com/our-process/

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INTEGRATED
Planning & Wealth Management, LLC

ABOUT US ▾ LEARNING CENTER CLIENT HUB **START HERE**

What we do for our clients.

Watch later Share

Watch on YouTube **Michael F. Conella, CFP®**

Is Integrated Planning & Wealth Management, LLC the right firm for you?

Our goal for this process is to demonstrate, in plain English, how we can serve you in helping you make the most out of your life with the wealth you have and how we bring simplicity, clarity, and confidence to an otherwise confusing, complicated, and intimidating subject: money.

There is no charge for this process—we want to help you make an informed and educated decision about working together so you can see exactly how we can serve you before you agree to pay us a penny.

Our Process Step-By-Step

1

Initial Phone Meeting

Before committing your time or ours, this 20 to 30-minute phone call will give us both a chance to make sure your situation matches our expertise. We want to get a vision of your goals, intentions, challenges, and opportunities unique to your situation and circumstances. After all, you wouldn't schedule testing without a patient inquiry.

If we aren't a good fit, either way you'll leave the conversation with an action plan: we'll gladly introduce you to a firm who is better suited to your needs.

2

Our Analysis

Prescription without evaluation and diagnosis is malpractice

Your answers to our intake questions, along with the documents we have requested, will help guide our analysis, which will result in plain-English answers to a number of critical questions.

We will apply over a decade of experience, thousands of hours of training, studying, and mentoring by the profession's top experts, and expertise as a CFP® Professional to answer the financial questions and concerns you identified and outlined for us in Step 1.

3

Plan Presentation

Writing the prescription

During this meeting we will explain, very clearly, exactly what you need to do to achieve your financial goals and build the wealth to support the life you desire and deserve. Through these recommendations and with our guidance you will see, at a high level, how our firm can improve your finances and assist you in building, growing, and preserving your wealth.

At the end of this meeting, there's no hard sell - we'll ask you to reflect on our process and whether our expertise will benefit you and your family.

4

Sleep On It

Being respectful of The Pillow Factor

Having been in this profession for more than 10 years, we are in no rush for clients to make a decision. Prior to deciding if we should work together, ask yourself the following:

1. Do I like/trust/respect the team at IPWM?
2. Will the benefits they provide exceed the fee I'll pay?
3. Do their recommendations make sense to me?

If a smile comes across your face, we call that having a high pillow factor —meaning you can sleep comfortably knowing you have someone who's genuinely and authentically committed to serving you well.

5

Getting Started

Framing the vision

We will transition you into our New Client Process and begin gathering any additional information necessary for us to begin serving you. Prior to this meeting, we will make sure that any additional questions have been answered to your satisfaction.

While we would love to work with you, if you get to any point in the process and decide that it's not a good fit, we will wish you all the best and continued success. Translation: there will never be any pressure. That's not the experience I would want for my family, and I wouldn't wish that on you either.

LEARN MORE ABOUT
WHO WE ARE >

SCHEDULE A MEETING
WITH US •

- Today
- Calendar
- Contacts
 - Jonathon Doe
 - Accounts
 - Activities
 - Documents
 - Notes
 - Know Your Client
 - Email History
 - More...
- Reports
- Opportunities
- Seminars
- Social
- Workflows

Jonathon "John" Doe ★
 Engineer
 Married to Jane Doe | John & Jane Doe

1		Welcome/Confirmation call	Client Service (Team)	05/13/2021	Not Started
1		Change target date to date of call	Client Service (Team)	05/13/2021	Not Started
1		Advisor & Prospect speak		Due by: 05/13/2021	
1		Send email to prospect		Due by: 05/13/2021	
1		Thank you card/basket to referral		Due by: 05/13/2021	
1		Verify Discovery documentation received		Due by: 05/20/2021	
1		Final attempt to schedule 1 page Plan Presentation (OPP) meeting		Due by: 05/27/2021	
1		Adjust WF date		Due by: 06/17/2021	
1		IPWM Analysis		Due by: 05/06/2021	
1		Plan Presentation (OPP) Meeting		Due by: 05/13/2021	
1		Send Gift basket only if directed (otherwise wait until step in onboarding)		Due by: 05/14/2021	
1		Contact Prospect post planning mtg		Due by: 05/20/2021	
1		Assign Client On-Boarding WF & change client status		Due by: 05/20/2021	
1		Prospect not engaging - Change		Due by: 05/20/2021	

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05/13/2021 TARGET DATE	Jonathon Doe LINKED CONTACTS	0 STEP NOTES	Enter Contact Info CURRENT STEP	0% % COMPLETE
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Appt - Prospective Client Discovery Process workflow options - new step

Use this workflow to engage a prospect that is interested in working with the firm. This person may or may not have come from a referral. This workflow outlines the steps of the Prospective Client Meeting Process. See IPWM Prospective Client Meeting Process for details.

Target Date: Beginning of Workflow
 2nd Target Date: Date of Discovery call
 3rd Target Date: Date of Plan Presentation

1	Enter Contact Info		Due by: 05/13/2021	Complete Step
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Task Name	Assigned To	Due Date	Status	Completed
1 Enter Contact Info into Redtail	Client Service (Team)	05/13/2021	In Progress	Complete

1	Schedule 20-30 minute Discovery call		Due by: 05/13/2021	
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Task Name	Assigned To	Due Date	Status	Completed
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- Today
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Jonathon "John" Doe

Engineer
Married to Jane Doe | John & Jane Doe

05/13/2021 <small>TARGET DATE</small>	Jonathon Doe <small>LINKED CONTACTS</small>	0 <small>STEP NOTES</small>	Enter Contact Info <small>CURRENT STEP</small>	0% <small>% COMPLETE</small>
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Enter Contact Info Due by: 05/13/2021 Complete Step

Task Name	Assigned To	Due Date	Status	Completed
Enter Contact info into Redtail	Client Service (Team)	05/13/2021	In Progress	Complete

Schedule 20-30 minute Discovery call Due by: 05/13/2021

Task Name	Assigned To	Due Date	Status	Completed
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Triage Meeting Details

We are a full-service wealth management firm best suited for optometrists who want a collaborative planning relationship and are willing to delegate their investment management to a team of experts. (Note: We DO NOT offer an hourly fee schedule or a one-time project fee option).

- ← Sounds like a potential fit! I don't want to spend my time researching financial planning or investment management strategies. I'd rather have an experienced team that specializes in serving optometrists guide me. *

How will we meet? *

How did you hear about us? *

- Google search
- 20/20 Money Podcast
- ODs on Finance FB Group
- Optometry Publication
- Speaking Engagement
- LinkedIn
- Referral
- XYPN Advisor Search

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Client Process: Get Organized

Reminder 21

Prospective Client: Plan Presentation Follow up (Virtual)

Inactive Types

Drag appointment types here to make them inactive

Hi there %first%,

We're only a few days away from our conversation! Rarely is financial planning something that excites people, but know that we're truly excited to talk with you and learn how we may be able to serve you!

I wanted to take this opportunity to share our approach to serving clients that we work with around the country. While %calendar% will be meeting with you, we want to let you know that we very much embrace a team approach to serving clients. Much like it takes a team to provide the level of care you deliver to your patients, we believe the same to be true in a planning relationship.

Each client is supported by a Lead and Associate Advisor along with our Client Service team. The best way to share the roles of our team is to draw the analogy to an optometry practice:

- The lead advisor is like the OD. You have the knowledge, skillset, and experience to do your job, and you do it well. Your value to the relationship is the intellectual property that you possess, which allows you to accurately and confidently diagnose and prescribe. The Lead Advisor possesses the same knowledge, skillset, and experience to serve optometrists well.
- The Associate Advisor is like your optician, tech, and scribe all rolled into one. They're also a CFP® and will be interacting and serving you throughout the Discovery process. Should you choose to align with our firm and join our client family, they will also be involved in the ongoing planning that we do for you.
- Our Client Service Team is like your front office team. They're usually the first point of contact for your patients, handle paperwork, charts, billing, scheduling, etc. Our client service team fills a very similar role in the structure of our team.

You may have heard the phrase "Teamwork makes the dream work" and while it has a bit of a cheesy tone to it, we've found that a team approach elevates the client experience.

You may have found us because of something that Adam wrote, spoke, or talked about on the [20/20](#)

New Discovery Call Scheduled – Confirmation/Welcome Script

Hi Dr. <<Prospect>>, this is <<OFFICE MANAGER>> of Integrated Planning & Wealth Management. I just wanted to reach out and connect with you briefly and thank you for taking time to schedule a Discovery call with <<ADVISOR>>.

<<IF THEY'VE INDICATED WHAT THEIR TOP CONCERN THAT THEY'RE LOOKING TO HAVE SOLVED IS IN THEIR ACUITY INTAKE FORM>>...

I appreciate you sharing details of what you'd like to discuss with <<ADVISOR>>. Many of our existing clients have come to us with very similar questions, so I'm confident that you'll gain value from your conversation with him.

<<IN CLOSING>>

Is there anything else that you'd like to share with <<ADVISOR>> that will better prepare him/her for your upcoming conversation?

<<ADD ANYTHING ELSE MENTIONED WITHIN THE OUTLOOK APPOINTMENT APP AS A SEPARATE LINE ITEM. THIS WILL NOT UPDATE IN ACUITY AND ISN'T MEANT TO BUT RATHER BE A POINT-OF-REFERENCE FOR ADAM WHEN HE MAKES THE CALL>>

Thanks again for scheduling time with <<ADVISOR>> and enjoy the rest of your day, Dr. <<PROSPECT>>.

Initial Confirmation 5

Prospective Client: Plan Presentation

Initial Confirmation 6

Client Related: Virtual Planning Meeting

Initial Confirmation 7

Client Related: Q1 Practice Financials Review

Client Related: Q2 Practice Financials Review

Client Related: Q3 Practice Financials Review

Client Related: Q4 Practice Financials Review

EXAMPLE: Confirmed: %type% on %time% with %calendar%

<> B I U S [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon] [List Icon]

Insert Field Add Button

Hi %first%,

You may not believe it, but we're doing a bit of a "happy dance" over here.

That's because we're passionate about helping optometrists across the country feel educated and informed about an otherwise intimidating and confusing topic: personal finance and investing.

We know we'll never be privileged to work with every optometrist.

But we're grateful to have earned a spot on your calendar to see if or how we can serve you.

We're looking forward to talking with you on %time%. At that time, we'll call you at %phone%.

At the end of this conversation, we'll both know if it makes sense to continue through our [Discovery process](#). Thanks again for sharing some of your time with us and we'll talk to you soon!

In your service,

The Integrated Planning & Wealth Management Team

[Change/cancel appointment](#)