CLIENT MEETING SURGES

Best Practices Guide
& Practice Resources

LIMITLESS

Surging Your Client Meetings

USE SURGE CYCLES TO ELEVATE YOUR PRACTICE—AND YOUR QUALITY OF LIFE.

Many advisors follow the traditional model: They meet with two to five clients per week—year in and year out. And they feel constantly depleted. They don't have the bandwidth to achieve their business goals, take time off or enjoy their personal lives.

There's a way to turn this situation on its head and take back control of your life and practice. Meeting surges are a productivity hack that can help you deliver greater value to clients while freeing up vast blocks of time throughout the year. The trick is scheduling three to six client meetings per day during set months of the year.

In your off-cycle months, you gain the time you need to pursue your own goals—whether that includes building a better business, narrowing your niche, connecting with prospects, onboarding new clients, traveling, or enjoying your family, hobbies and life outside of work. Surge at your comfort level to meet your goals:

Surge AT YOUR COMFORT LEVEL

3 MEETS A DAY	4 MEETS A DAY	5 MEETS A DAY
3 meets day 3 days week = 9 meets week	4 meets day 3 days week = 12 meets week	5 meets day 3 days week = 15 meets week
/ 160 meets = 18 weeks	/ 160 meets = 14 weeks	/ 160 meets = 11 weeks
2, 9-week surge sessions in April/May and Oct/Nov	2, 7-week surge sessions in April/May and Oct/Nov	2, 5.5-week surge sessions in April/May and Oct/Nov

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Surges: Best Practices

THE BASICS OF SURGE CYCLES

Surge cycles typically occur twice per year during months of your choosing. And they last four to eight weeks, depending on your schedule intensity.

Meeting weeks are organized as follows:

- Mondays are prep days
- Meetings are held Tuesday, Wednesday and Thursday
- Fridays are for follow-up or free time

You can design your surge schedule to accommodate your needs and your clients' needs. For instance, if your client base is doctors who work 12-hours shifts, you may need to offer meeting times that fall outside of regular business hours.

During off-cycle months, you'll meet with clients only when absolutely necessary to discuss major life decisions or urgent matters, such as buying a home. These meetings are situational—they're not full client reviews, so save regular case prep for the next surge cycle. Focus your situational meetings on the topic at hand.

SHIFTING YOUR MINDSET

Implementing meeting surges can be unsettling. Advisers often think if they make a change, clients will push back. If a client has always met with you in January, you might worry they'll insist on sticking to January. But that's almost never the case.

Those negative thoughts stem from your mindset. And that's something you can change. The first step is to simply set aside your reservations so you can give surges serious consideration.

Elevate your thinking about how you deliver meaningful value to clients. Your value is advice, not information. Clients are paying for the quality of your thoughts, not your time—or your old, familiar patterns. And when you get paid to think, the quality of your thought matters, immensely. With meeting surges, you standardize the process of setting up and holding client meetings, so you can focus on the intellectual work of delivering specialized service.

Surges: In Practice & Resources

SHIFTING TO SURGE CYCLES: ACTION STEPS

STEP 1: CREATE YOUR SCHEDULE

Putting surges into practice requires some careful planning. The first step is creating your schedule and setting your surge cycles. You have the freedom to pick the months that work for you. Fall and spring often work well for surges, but if you have scheduling conflicts, plan around them.

STEP 2: ESTABLISH A SYSTEM FOR MEETING INVITES

Several weeks before your surge begins, you'll need to schedule client meetings. Create a system and automate this process with a scheduling system so that your team isn't overwhelmed, and your clients receive consistent, convenient service. Consider the following invite schedule:

- 6 weeks out: Contact clients with calendar link
- 4 weeks out: Send scheduling reminder
- 3 weeks out: Call clients who still need to schedule a meeting
- Upon scheduling: Send meeting confirmation

If you're wondering how existing clients will react to surges, don't sweat it. Some clients may not even notice the switch. If they do ask about it, simply explain that your new meeting schedule allows you to deliver better service.

You may have some clients who can't fit into the surge cycle—maybe they're traveling, or their work schedule conflicts with your meeting days. It's OK to make exceptions for a few clients, as long as the new times work for you and you can keep exceptions very limited.

STEP 3: CASE PREP

Preparing for meetings is critical to make the client review highly focused and enhance the client experience. To help this process run smoothly, design a system for case prep. Here's a suggested outline:

- 4 weeks out: Review client situation and confirm meeting agenda
- 3 weeks out: Share meeting agenda with client and ask for feedback
- 2 weeks out: Prepare for the meeting, draft one-page plan, gather projections and other materials
- 1 week out: Send meeting reminder to client
- Day of: Prep meeting room and/or your office background for virtual meetings

This dedicated preparation process gives you the opportunity to customize each meeting and focus on the issues your clients care about most. For example, when a client reviews the agenda, they may mention that they just found out their aging parent needs to move into an assisted living facility. That exchange gives you and your team the opportunity to do some research and fold the results into your case prep. During the client's meeting, you can present the options you found along with some cashflow projections.

This careful preparation helps you stay focused and deliver personalized advice, while reducing the need for follow-up calls.

The final step of getting ready for meetings is preparing your physical space for clients. Clean the office, arrange a comfortable, intimate meeting space and set out snacks and beverages. For virtual meetings, select a clean, well-lit background and make sure the space looks professional on screen.

STEP 4: MEETING DAY

During a surge, meeting days can be long and intense for advisors. But they're also your time to shine. You and your team have done the prep work. Now you follow a disciplined schedule that allows you to be fully present with your clients—nothing else is competing for your attention.

Aim for meetings of 60 to 75 minutes. Any longer, and your client's attention starts to dip. After each meeting, take 15 minutes to organize your notes, fill in the details and write down the next steps you'll follow up on.

Between meetings, try closing your eyes and taking a few deep belly breaths. Or use any centering routine that clears your mind and helps you go into the next meeting with intention.

STEP 5: FOLLOW UP

On Friday, your follow-up day, review your notes from the week's meetings and draft a one-page plan or meeting summary for each client. Follow through on any next steps, such as connecting your client with an attorney, opening new accounts or looking into a tax issue.

Send the one-page plan to the client three to five days after your meeting. Schedule post-meeting check-ins for one to three months out, depending on the client's case.

Over time, clients will grow accustomed to the rhythm of your meeting cycles. They'll know when to expect your follow-up, your post-meeting check-ins and the scheduling reminders for their next meeting. That consistency helps reduce the number of calls you'll field throughout the year. Clients will know they can save their question for the next meeting or check-in.

STEP 6: DEBRIEF

When you set your surge schedule, include a time afterward to debrief with your team. If you skip this step, you'll miss out on a vital chance to review and refine your process. Ask what worked, what you learned and where systems broke down.

Make the debrief collaborative. This session is where you iron out the kinks and make your next surge better. Don't place blame on any individual for anything that went wrong. Instead, look for ways to improve your systems and elevate your performance.

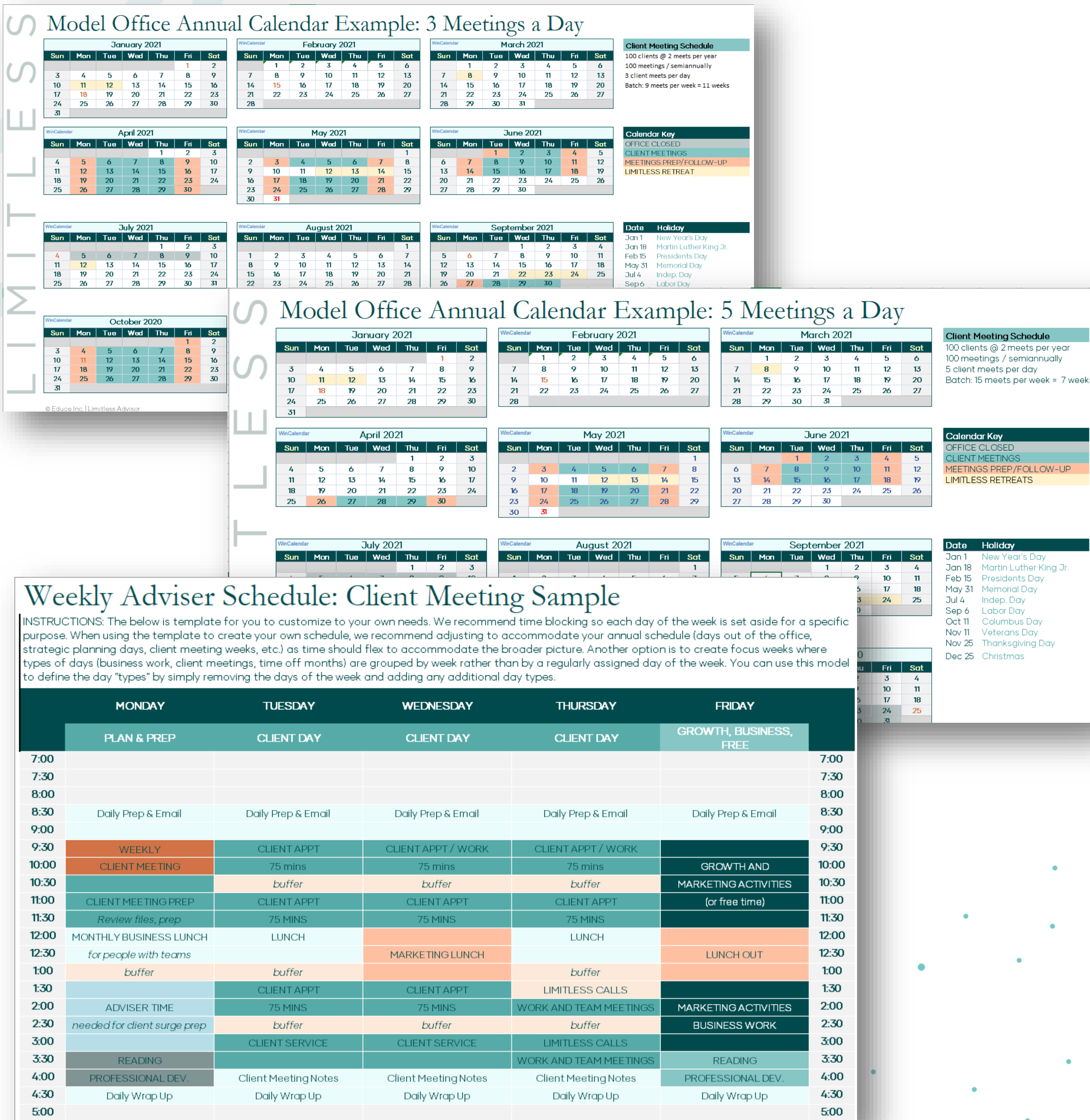
Finally, celebrate! Your team helped make this surge happen, so recognize and reward their hard work.

When you adopt meeting surges, you stop playing an endless game of whack-a-mole, reacting and putting out fires every day. You shift from a state of reacting to thinking. You free up time for you and your team to be intentional and deliver the experience that your clients really value…on your terms!

Surges: Resources

See online lesson, Client Meeting Surges, for available resources to support you as you implement this lesson.

RESOURCES:



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