Pre-Discovery Meeting Positioning

Conversation “Zero”

Pre-Discovery Conversation Frameworks for potential Certainty Clients

Produced by
Strategic Consulting & Training Pty Limited
trading as

Certainty Advice Group
MANLY NSW 2095, AUSTRALIA +612 89669135
admin@certaintyadvicegroup.com

Certainty Advice, Certainty-Based Advice, Advice Map, Outcomes Map, Certainty Map, Advice Grid, Cultivating Advice, Wobble Theory, Powered by Certainty, Fourth Generation, Advice Path and our C logo are all trademarks, registered trademarks or registered certification marks of Strategic Consulting & Training Pty Limited

© Copyright Strategic Consulting & Training Pty Limited trading as Certainty Advice Group – All rights reserved

CERTAINTY ADVICE®
THE FUTURE OF ADVICE.

Pre-Discovery Positioning
Conversations Frameworks

Prior Discovery Meeting
Conversation Zero
(5-20mins)

0. Positioning

Discovery Meeting
Conversations One-Nine
(60-90mins)

1.Purpose

2.Set-Up

3.Fundamentals

4.Signatures

5.Complexities

6.Significance

7.Confirmation

8.Advice Map Questions

9.FAQs/Next Steps

© Copyright Strategic Consulting & Training Pty Limited trading as Certainty Advice Group – All rights reserved

Conversation Zero
Four Steps

Prior Discovery Meeting
Conversation Zero
(5-20mins)

0. Positioning

Step 1 **Context**
Discuss meeting context

Step 2 **Approach**
Discuss advice approach

Step 3 **Logistics**
Discuss meeting logistics

Step 4 **FAQ**
Handling FAQs

© Copyright Strategic Consulting & Training Pty Limited trading as Certainty Advice Group – All rights reserved

Conversation Zero
Four Steps

Prior Discovery Meeting
Conversation Zero

0. Positioning

Step 1 Context

Discuss Meeting Context

STEP ONE – DISCUSS MEETING CONTEXT
(Approx. Five Minutes – Tone: Maintaining control)

- Hello/Introduction – the purpose of this conversation is to understand how we might be able to assist.
- Before we begin? Why now? Why us?
- Your pressing issue? Reason for making contact?
- Can you share some details about your current financial circumstances?
- Is this a sooner or later thing?

© Copyright Strategic Consulting & Training Pty Limited trading as Certainty Advice Group – All rights reserved

Conversation Zero
Four Steps

Prior Discovery Meeting
Conversation Zero

0. Positioning

Step 2 Approach
Discuss Advice Approach

STEP TWO – DISCUSS ADVICE APPROACH
(Approx. Two Minutes – Tone: Maintaining control)

- We call our initial meeting a “Discovery Meeting” because the objective is to discover if we can help and if it is the value you seek;
- We’ll address your pressing issues, ask lots of questions about your current circumstances and your desired future direction;
- Our specialty is comprehensive financial advice. While many of our advice relationships may start in one area of our clients lives, we believe the treatment of only a part of our client’s lives should not be attempted without a consideration of our client’s whole financial life – today and in the future;
- The meeting will discuss your pressing issue(s), help you understand our approach, and enable us to determine if we are a fit or not, and if we are, determine your best next steps.
- How does that sound?

© Copyright Strategic Consulting & Training Pty Limited trading as Certainty Advice Group – All rights reserved

Conversation Zero
Four Steps

Prior Discovery Meeting
Conversation Zero

0. Positioning

Step 3 Logistics

Discuss Meeting Logistics

STEP THREE – DISCUSS MEETING LOGISTICS

(Approx. Three Minutes – Tone: Maintaining control)

- Apart from setting aside approximately 90 minutes, the only preparation is a collection of some of your financial documents such as…<include relevant documents needed>
- I ask you bring your "partner/spouse/significant other" for us to comprehensively understand what is progress for you both individually and collectively;
- [*If extraordinary workloads*: We currently have a x week wait for our first available Discovery Meeting, is that OK for you?]
- I also ask to arrange not only a meeting time for our Discovery Meeting, to understand your situation, but also a follow-up Meeting a couple of weeks later, to discuss our recommended approach and steps after we have done a little work – when suits?
- Do you have any questions?
- We will send you a confirmation of our meeting on <date/time>…

© Copyright Strategic Consulting & Training Pty Limited trading as Certainty Advice Group – All rights reserved

CERTAINTY ADVICE®
THE FUTURE OF ADVICE.

Conversation Zero
Four Steps

Prior Discovery Meeting
Conversation Zero

0. Positioning

Step 4
FAQs
Handling Frequently Asked Questions

STEP FOUR – FREQUENTLY ASKED QUESTIONS
(Approx. Five Minutes – Tone: Inquisitive)

- If I just want you to address my pressing issue, do you offer one-off advice on only a part of my financial life?
  ✓ WITHOUT BROADER DISCUSSIONS, WE CAN NOT BE CONFIDENT THAT TREATING ONE PART OF YOUR FINANCIAL LIFE WILL BE IN YOUR OVERALL BEST INTERESTS
- Can you provide an indication of the type of fees you charge?
  ✓ OUR MINIMUM NEW FEES FOR COMPREHENSIVE ADVICE IS APPROX $(YOUR ANNUAL MINIMUM FEE)
- Do you separate the components of your comprehensive approach in terms of fees and implementation steps?
  ✓ WE DO NOT BELIEVE THAT DISSECTING THE COMPONENTS OF OUR ADVICE WILL RESULT IN BEST LONG TERM OUTCOMES FOR YOU
- My "partner/spouse/significant other" is not interested or involved with my pressing issue. Can they potentially be involved at a later time?
  ✓ OUR COMPREHENSIVE APPROACH IS BUILT UPON THE VALUE FOR EVERY SIGNIFICANT PERSON AFFECTED. UNDERSTANDING FIRST-HAND WHAT IS OF VALUE IS FUNDAMENTAL TO OUR APPROACH
- If not "a fit"…
  ✓ WE ARE NOT FOR EVERYONE. I CAN PROVIDE CONTACT DETAILS OF OTHER ADVISERS WHO MAY BE ABLE TO ASSIST? (OBTAIN EMAIL AND FORWARD THIRD-PARTY CONTACTS)

© Copyright Strategic Consulting & Training Pty Limited trading as Certainty Advice Group – All rights reserved