

Pre-Discovery Meeting Positioning Conversation "Zero"

Pre-Discovery Conversation Frameworks for potential Certainty Clients

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Pre-Discovery Positioning Conversations Frameworks

Prior Discovery Meeting
Conversation Zero
(5-20mins)

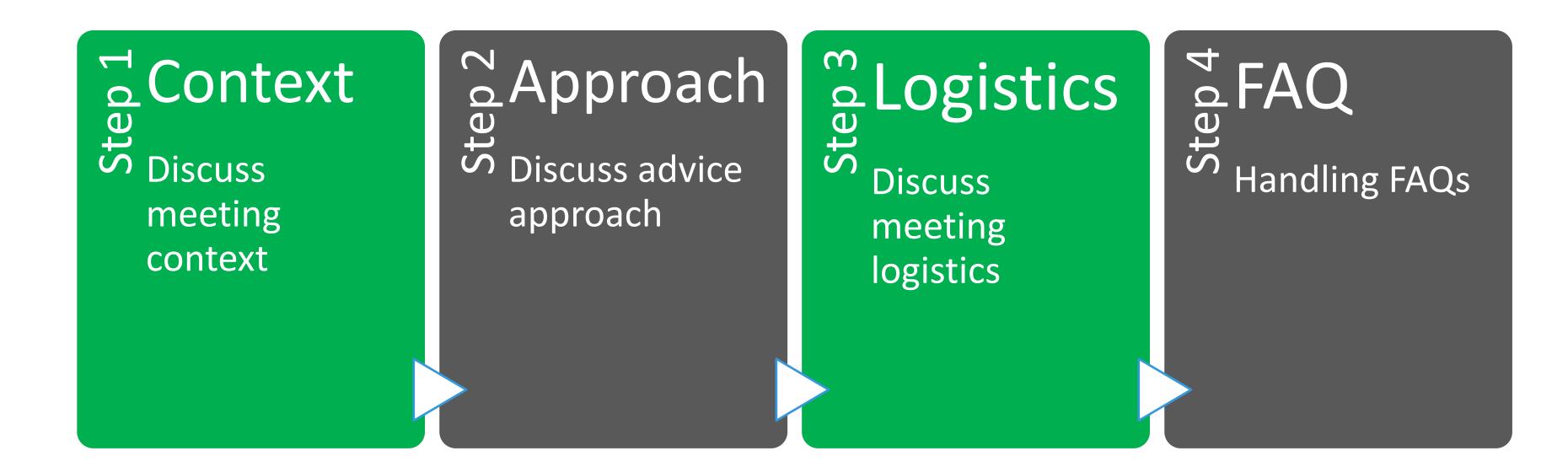
O. Positioning





Prior Discovery Meeting
Conversation Zero
(5-20mins)

0. Positioning





Prior Discovery Meeting Conversation Zero

0. Positioning



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?



Prior Discovery Meeting Conversation Zero

0. Positioning

Approach

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?



Prior Discovery Meeting Conversation Zero

0. Positioning

Logistics
Discuss
Meeting
Logistics

Conversation Zero Four Steps

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>...



Prior Discovery Meeting Conversation Zero

0. Positioning

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)