How to Handle Scheduling Appointments

TOOLS:

ACTIVITY TYPE

ACTIVITY/ NOTE CATEGORY

ACTIVITY TEMPLATES

REPORTS

Observation: Client reviews aren't the only time that your office meets with clients. In fact, depending on your sales process, there can be many different types of appointments that are held with prospective clients or clients. Consistently inputting activity information directly results in reporting capabilities.

Directions:

1. Determine the different types of meetings or events that your office has with leads, prospects, clients, families, etc. Add the different meetings as Types or Categories in the database. Use the "Calendar Style Guide" as an example on the next page.
   MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > ACTIVITY TYPES > ADD
2. Create Activity Templates for the different meetings.
   MANAGE YOUR ACCOUNT > ACTIVITY TEMPLATES > NEW
3. Report on the different meetings that have been or will be held by the office.
   REPORTS > ACTIVITY REPORTS > ACTIVITIES BY CONTACT
4. Report on clients, prospects, or leads with no upcoming activities.
   REPORTS > CONTACT REPORTS > CONTACTS WITH NO UPCOMING ACTIVITIES

Result: Systematizing the different types of appointments that your office has will decrease the number of items that are missed or forgotten when preparing. It also streamlines what everyone in the office can expect to prepare for a particular meeting setup.

Helpdesk Link: http://bit.ly/howtoRTU

Activity Templates

Client Review Appointment			
Subject:	Client Review		
Type:	Appointment	**Category:**	Client Review
Description:	Agenda • Check Personal Profile form information • Review financial plan • Discuss next year's goals		

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Activity Templates

Client Signatures			
Subject:	Signatures		
Type:	Appointment	**Category:**	Signatures
Description:	1. Mark sections for signatures with sticky notes 2. Set out water 3. Set out client paperwork		

Prospecting Engagement			
Subject:	Engagement Meeting		
Type:	Prospecting	**Category:**	Engagement
Description:	• Set out water • Clean/ organize conference room		

Phone Call – Money Movement			
Subject:	Money Movement		
Type:	Phone Call	**Category:**	Money Movement
Description:	Attach account to activity Amount: Method of Delivery: Reason:		

Family Planning			
Subject:	Remote – Family Planning		
Type:	Webex / Zoom	**Category:**	Family Planning
Description:	Agenda - Review Client's financial plan - Discuss succession - Offer financial planning to family members - Questions		

Calendar Style Guide

Activity Type:	Activity Category:	When to Use:
Appointment	Client Review	Existing client yearly review meeting.
	Family Planning	Optional family planning meeting with client and beneficiaries.
	Life Insurance	Meeting to talk about life insurance options.
	Signatures	Client wet signatures needed.
	Estate Planning	After a client death, meeting with family to discuss options.
Prospecting	Discovery	Initial meeting with potential new client.
	Engagement	Second meeting with potential client to determine fit.
	Implementation	Third meeting with potential client.
	Plan Delivery / Onboarding	Decision meeting with potential client.
Phone Call	Client Review	Client Review via phone.
	Customer Service	General phone call with contact.
	Money Movement	Phone call with client regarding transfer/ withdrawal.
Webex / Zoom	Client Review	Client Review via remote.
	Family Planning	Optional family planning meeting with client and beneficiaries via remote.

**All of Redtail's best practice recommendations in these "How to Handle" documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*