

Advisory Council Speaking Notes 1

Before your event takes place, sit down and prepare a list of questions concerning service issues that you will be presenting to your guests at the Council meeting. Don't make it too complicated; it is to serve as a guide for discussion rather than a survey.

Introduction

We've provided the following notes as a guide to help you start the evening:

- Just so you know, I didn't decide to host a dinner for ten people and start calling until I filled the list. You were hand-picked, and if only three of you were able to be here, then this dinner would have been just for the three of you. I'll only say this one more time and I hope you take it to heart; you represent my best and favorite clients. If I could, I would work with people who are just like you.
- In this business, we spend a lot of time hiding the fact that it is a business. We never talk about new clients or anything like that. We more or less try to appear like doctors - always having but never really needing patients.
- The reality is that this is a business. I have I commitments to keep YOUR BUSINESS/SERVICE going. The YOUR INDUSTRY is a strange one; everyone needs good YOUR SERVICE and a sound plan, but you cheapen yourself when you try to "sell your services."
- This really is the crux of what I would like to discuss with you. In a perfect world, I would spend my time managing my clients', and my assistant would be answering the telephone and booking appointments. What I least want to be doing is prospecting. So I want to improve my level of service and understand your expectations.
- I realize that there is work to be done on my side of things, and I am up to the challenge. But I figure if I keep my eyes open and look for ways to improve my services, I should manage to increase the level of recommendations from my existing clients.

- What I'd like you to do when considering these questions is to pretend that you don't know me or work with an advisor right now. My goal is to understand exactly what I would have to do to guarantee two things.
- Firstly, that I am providing the most specific services, in the most preferred manner, to my ideal clients, who are people like you. Secondly, that by providing these services, my clients will know me well enough and feel comfortable enough with me professionally that they would have no reservations about referring me to a friend or family member who is in a similar situation.
- Please note that I will not be asking you or any other client for referrals. I'll increase my level of service, customize the delivery of information and leave the recommendations up to you and my other clients.

Body of the Meeting:

- Use the 16 Questions for Advisory Council for your agenda.

Conclusion:

- Where do we go from here? Well, as I mentioned earlier, I will mail each of you a report outlining our discussion. I will take some time to assimilate what I heard and implement what I can. I would also like to meet again in about 4 months. We will send you the details and the agenda.
- Thanks again for helping out tonight.