

# Steps 1 - 3 of Anton Swanepoel's 10-step process of professional client engagement.

Client engagement lies at the heart of your business. In this article we highlight the first three important steps. We'll cover the next few steps in an upcoming issue of *Glacier Weekly*.

## 1. Prospecting

Treat your prospects like gold. Without prospects, who will hopefully become clients, you won't be able to grow your business. Building relationships on mutual trust and respect lies at the heart of a solid network. And once you have a strong network in place, it becomes easier to obtain referrals from word-of-mouth. This is ultimately the position you want to be in, as prospects who approach you have already been "sold" on why they should entrust their financial future to you. Keeping a list of potential prospects will help to prioritise when it comes to setting up appointments. It's important to keep the Protection of Personal Information Act (POPIA) in mind when dealing with client information. At this stage, with your list in hand, you have everything you need – just begin!

## 2. Setting up appointments

As stated in the prospecting section above, there are legal requirements – but for the most part these are actually common sense. The most important task at this stage is to show empathy, sincerity and enthusiasm in order to win over trust. Unless the prospect feels they can trust you, they won't be willing to listen to your offering. Planning what you intend to say, and stating the reason for your call upfront, will help guide the conversation.

## 3. A professional introduction to clients

First impressions truly do count, and here's where it's important to establish a rapport and build a connection with potential clients. Page 29 of the eBook sets out the legal requirements around what needs to be disclosed, but it's *how* you do it that counts. Rather than using a tick-box approach, use this as an opportunity to build in your vision, your values and what you specialise in.

In a forthcoming issue, we'll focus on the next three steps in the process.

[Access the eBook](#)

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