

Steps 7 - 10 of Anton Swanepoel's 10-step process of professional client engagement.

In this follow-up article we highlight the last four important steps relating to client engagement.

Click [here](#) to revisit steps one to three, or [here](#) to view steps four to six.

7. Present your proposal

This is the final step in the trust-building process and this is where you have an opportunity to show an interest in serving your client and proving your value. Remember to help your clients remember *why* they're considering your proposal. If their *why* is meaningful to them, the rest is made easier. See the eBook for the five stages of the buying decision as well as the legal requirements applicable to this stage.

8. Agree on financial solution(s) to be implemented

Your client may agree to the proposal in full, or only to parts of it, or they may even request changes. Irrespective, this will hopefully be the start of a long-term and mutually beneficial relationship. The relevant section in the eBook discusses the legal requirements related to this step and also touches on the law of contract.

9. Implementation of agreed solution(s)

This step applies to the client and adviser alike. In the case of financial products, the adviser will take care of the documentation as soon as possible. But the client may also be responsible for the implementation of financial planning solutions, such as budgeting or drawing up a will.

10. Review the client's situation and render ongoing advice and services

This step can be compared to a regular health check and should be conducted at least annually or when there is a significant change in your client's financial circumstances. Personal circumstances change all the time, even more so in the current uncertain environment, and this can have a significant impact on your client's financial strategy. See the eBook for more on the

benefits that ongoing reviews offer.

[Access the eBook](#)

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