



LIBBY GREIWE

THE EFFICIENT ADVISOR

Join The Community



Libby Greiwe 🎙️ ChFC, RICP, FIC
The Efficient Advisor Podcast | Helping
Financial Advisors create systems and proces...



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THE 8 PROCESSES:

1. MARKETING/PROSPECTING
2. PROSPECT-TO-CLIENT (FINANCIAL PLANNING)
3. ONBOARDING
4. ONGOING CLIENT SERVICE MODEL
5. CLIENT EXPERIENCE
6. REFERRAL PROCESS
7. INVESTMENT PROCESS
8. EMPLOYEE EXPERIENCE

***Don't worry, this list is in the resources!**

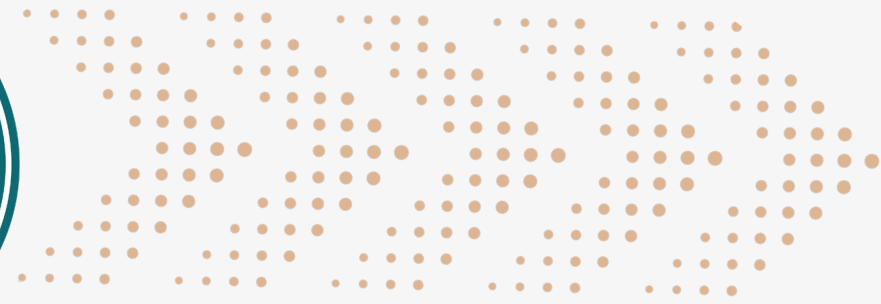


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Onboarding



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ONBOARDING

Before

DAY 1 - 30: PROFESSIONALISM & EFFICIENCY

DAYS 31 - 60: SURPRISE & DELIGHT

DAYS 61 - 90+: SHOCK & AWE

First Year



REMARKABLE ONBOARDING MUST HAVES

Intel Process, Team Involvement, Solid Planning Process

DAY 1 - 30: PROFESSIONALISM & EFFICIENCY

SOPs & Error - Free Processing; Paperwork Party; Weekly Status Updates; Breaking Up Process; Thank You Card

DAYS 31 - 60: SURPRISE & DELIGHT

Formal Onboarding Meeting; Expectations of Our Engagement; Check ins; Welcome Email/Kit

DAYS 61 - 90+: SHOCK & AWE

Check - ins incorporating intel; Contract Review and/or Statement Review; Something Extra (Gift, Tax Season, Personal Video, etc)



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