



# FINANCIAL ADVISORS

# **Business Development Service**

## Email Automation Process Flow

for

## Review Meeting Reminders

### Introduction

The review meeting reminder automation is designed to streamline the process of organising review meetings with your clients, and ensure that review meetings are organised at any appropriate frequency with different types of client. Automated review meeting reminder emails are sent out on the date the client's review meeting is due, and contain a link allowing the client to book a meeting directly with you.

The automation also includes an automated reminder if the client does not open the initial email.

### Required Data

The following data is required for this automation to work:

- First Name
- Email Address
- Review Date (in dd/mm/yyyy format. Active Campaign will ignore the year and send on the same date every year)

### Process Flow

1. The automation will be triggered on the contact's review date.
2. When the automation starts a 'review meeting notification' email will be sent to the contact's email address.
3. The automation will wait for 3 days
4. The automation will check to see if the contact has opened the review meeting notification email.
5. If the contact has opened the email the automation will end.
6. If the contact has not opened the email a 'review meeting reminder' email will be sent to the contact's email address.
7. The automation will end.

## Points for Consideration

The process described above is intended to provide a simple, automated review meeting booking and reminder process for all clients for whom a review meeting is appropriate and assumes a review meeting will be held once every year.

Review meeting reminders will be sent to all contacts with a review meeting date present in Active Campaign. To stop contacts receiving the automated review meeting reminders just delete the review meeting date from Active Campaign.

The following points should also be considered when setting up the review meeting reminder process:

### Frequency

The standard review meeting frequency is once every 12 months, but this can be changed to suit your individual clients' requirements. The review meeting frequency and dates should ideally be held in your CRM system and we will export the data regularly and import it onto Active Campaign.

Please let us know if you would like to use a different standard review meeting frequency, or if you would like to have different review meeting frequencies for different types of client.

### Email wording

You can change the wording of the emails your contacts receive to suit your own personal preferences and writing style. We have included sample wording for the 'review meeting notification' and 'review meeting reminder' emails at the end of this document which we will use when setting the automation up.

Please let us have details of any changes you would like to make to the standard wording.

### Calendly links

The emails sent out as part of this automation will include a button the contact can click to book a review meeting with you via the Calendly system. We also recommend providing a telephone number the contact can call if they prefer not to use the online booking system.

Calendly will obviously need to have been set up and linked to your diary before this automation can go live. If you cannot use Calendly for any reason, contacts will be encouraged to call to make an appointment.

A 'Client Review' meeting type will need to have been configured in Calendly for use with this automation. Please see the separate Calendly Meeting Types overview for further details.

### Reminders

The standard automation will send a reminder email after 3 days to any contacts who do not open the first email. Further reminder emails can be configured if required, and different reminder frequencies can be configured for different types of clients.

Please let us know if you would like to discuss further.

## Sample Wording

We have provided below some sample wording you may wish to consider for the emails used as part of this automation. Please let us have details of any changes you would like to make to the sample wording.

### Review Meeting Notification Email

Dear [[First Name]]

As part of the quality service we aim to deliver, we also want to ensure that your policies and plans keep up to date with your circumstances.

If your personal and/or family circumstances have changed significantly in the last 12 months, then we should get together to discuss and review. Significant changes include things like changing job, moving house, having children, etc., or anything else that has an impact on your overall income and expenses.

If you have had any relevant changes to your circumstances over the last 12 months, please click the button below to arrange a review meeting with me. It only takes a minute to set the meeting up, and the actual meeting shouldn't take more than an hour. Time well spent to make sure your financial planning is up to date and in order.

If things haven't changed for you over the last 12 months, then there is no need for you to do anything - I'll send you another email same time next year! If you have any other questions, please feel free to reply to this email or give us a call on [[Office Phone Number]].

Cheers

[[Advisor Name]]

### Review Meeting Reminder Email

Dear [[First Name]]

This is just a quick follow up to the review meeting email we sent you a few days ago. Sorry to follow up again with you, but an annual financial review is very important if your circumstances have changed so I wanted to make sure it hasn't slipped your mind!

If your personal and/or family circumstances have changed significantly in the last 12 months then we should get together to discuss and review. Significant changes include things like changing job, moving house, having children, etc., or anything else that has an impact on your overall income and expenses.

If you have had any relevant changes to your circumstances over the last 12 months, please click the button below to arrange a review meeting with me. It only takes a minute to set the meeting up, and the actual meeting shouldn't take more than an hour. Time well spent to make sure your financial planning is up to date and in order.

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Cheers

[[Advisor Name]]