

An effective meeting means being in the right place at the right time

Where you choose to meet clients should be a deliberate and carefully thought-out decision. Martin Mulcare considers your options.

Recently I have enjoyed a few conversations about the choice of location for specific meetings. The first thing that struck me is that many advisers are creatures of habit – or perhaps it is better expressed by saying that they are comfortable with their current business practices. I hope to challenge those habits (or practices) and ensure that your choice of location is conscious and deliberate – and appropriate.

This column deals only with client meetings, not with meetings with suppliers or other parties.

Options for locations include your office, which may mean a meeting room or it may mean an actual office; a café or a restaurant; and the client's home or office.

The fundamental assumption I am relying on is that you are a professional working in a professional business.

Your office

This should be the default venue for client meetings, as clients would expect to meet their professional advisers in the professional environment of their business address. I will outline some exceptions; but initial meetings (aka "discovery" meetings), review meet-

ings (aka "progress" meetings) and any meetings relating to implementation should all take place at your business address.

The client meetings I have listed should take place in a meeting room. Resist the temptation to conduct your meeting in your working office. It is not a suitable venue. It carries a confidentiality risk, even if your desk is usually clear. It encourages rapport conversations, rather than trust conversations. It also carries the risk of distraction or interruption, even with your door closed and your PC turned off. Don't do it!

Café or restaurant

A café or restaurant is definitely suitable for "ideal client meetings", when you invite your favourite clients for a conversation about their experience as a client of your firm. It's really a personal market research meeting. It may also be an opportunity to thank your client for referrals. This is a relationship-oriented event and so, to differentiate purpose, it should not be held in your meeting room. I know that some advisers like to have a "pre-meeting meeting" with prospects over coffee to determine whether or not



to proceed with a discovery meeting. Don't. Find another filtering method, or practice saying "no" after 15 minutes of the discovery meeting. I urge you to make a professional first impression by conducting your initial meetings in a professional environment using your professional discovery skills.

Client's home or office

I know that some advisers are happy to meet their clients at their clients' home/office. They tell me that it is more convenient for their clients. They tell me that it saves time for their busy, important clients. I tell them that professionals don't make house calls.

It's not just the professional image that is at stake here. If you choose to play on their home ground you have lost control of the environment and, potentially, control of the meeting.

You are also at risk of distraction and interruption as well as the risk of switching to "rapport mode".

Don't do it. If they are not prepared to visit you, what makes you think that they will be prepared to take your advice? ■

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