FOUNDATIONS · RESOURCE 14

Follow-Up Structures That Support Client Success

TL;DR · QUICK SUMMARY

- Many clients leave financial meetings with good intentions but struggle to follow through on actions.
- Clear follow-up structures can improve engagement, confidence and completion rates.
- Effective follow-up supports memory, organisation and accountability.
- Consistency often matters more than complexity.

A Note Before You Read On

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Why This Matters

Clients often receive a significant amount of information during financial planning meetings.

Even when a client understands and agrees with recommendations, turning plans into action can sometimes be challenging.

Follow-up structures help bridge the gap between intention and implementation.

What This Might Look Like

A client may:

- Forget agreed actions.
- Feel unsure where to start.
- Leave meetings feeling motivated but later become overwhelmed.
- Delay paperwork or forms.
- Lose track of timelines and next steps.

What You Can Do

1. Provide Clear Action Summaries

Include:

- Agreed decisions.
- Priority actions.
- Deadlines.
- Responsibilities.
- Next review dates.

2. Create Manageable Next Steps

Where possible:

- Keep actions concise.
- Break larger tasks into stages.
- Highlight what is most important.

3. Use Consistent Follow-Ups

Consider:

- Written summaries.
- Reminder emails.
- Progress check-ins.
- Follow-up calls.

- Automated prompts where appropriate.

Helpful Phrases You Can Borrow

You don't have to use these exact words — take what fits and leave the rest.

> "I'll send a simple summary of today's actions."

> "Let's agree what needs to happen first."

> "Would reminders be helpful, or would you prefer to manage this independently?"

> "What's the easiest next step we can take?"

Quick Tips

- Make actions clear and specific.
- Avoid lengthy follow-up emails.
- Highlight priorities.
  Use reminders where appropriate.
- Confirm understanding.
- Keep processes consistent.
- Focus on achievable next steps.

Before You Go

A great financial plan only creates value when it can be put into action.

The most effective follow-up structures don't add complexity.

They help clients stay focused, organised and confident about what comes next.

Small, consistent support can make a significant difference.