FINANCIAL ADVISORY LAUNCH PROGRAMME · ACTIVATE YOUR EXISTING RELATIONSHIPS AND BOOK

Warm-network activation worksheet

Contacts, niche fit, trigger events, and outreach status in one place.

01 List everyone who already trusts you

Include client relationships you might bring across, but only within your prior obligations and your network's rules.

Former colleagues, managers and professional contacts.

Friends, family and personal contacts who know people who might need advice.

Client relationships you may be able to bring, and the obligations that apply to each.

02 Segment by niche and trigger event

People seek advice at moments, not at random. Note who fits your niche and what might prompt them.

Who on your list fits your niche?

What trigger event might they be approaching: a retirement, an inheritance, a business sale, a redundancy?

03 Reach out and track

You are offering to help, not selling. Keep it personal, and log every conversation.

Your personal, human-first message to each contact.

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Where you will track every conversation and its status.

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