



Clients without a meeting — 210 files prepared

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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Sorted by what has changed for them · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **Calling in file order means calling first the people who need nothing**. The 210 files are sorted by reason to call.

What reading the 210 showed

Reason to call	Volume	What it represents
Risk profile not reviewed for more than 24 months	84	A reason to call in itself, and a legitimate one
Deadline within 12 months	61	End of lock-in, end of contract, regular deposit ending
Idle cash above 5 %	47	€1.6m in total
No transaction and no contact for 36 months	18	Those whose departure only shows on the day of the transfer

What is prepared for each

Element	Content
Up-to-date report	Composition, performance, transactions, charges
Reason to call	In one sentence, drawn from the facts of the file
Factual elements	The six elements of the meeting file
Slots	Three, in the diary of the adviser who follows the client

What the quarter gave

Measure	Value	Who measured it
Meetings held out of the 210	148	Advisers' diaries
Additional assets entrusted after those meetings	€3.4m	The firm's partners
Twelve-month client retention	91.8 % → 97.2 %	51 relationships kept out of 940

The asset figure is the firm's, not the agent's: the agent made the meetings possible, the advisers held them, and the advice given in them is theirs.

No client ever again reaches 18 months without a meeting without the firm knowing it. The report runs to one page per adviser and updates itself every Monday.

For the firm to set

Alert threshold without a meeting: _____ months

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