BUSINESS DEVELOPMENT UNIVERSITY

HIGHER LEARNING, HIGHER EARNING™

CLIENT VISIT CHECKLIST

	Questions/ Information to uncover	Notes
☐	Get update on their current situation	
☐	What are your top 3 goals/ initiatives/ priorities for the upcoming year? What are you doing to address them? What is working? What is not working? What is the most important and why.	
☐	What are some of their key challenges? What are they doing to address them? What is working/ not working?	
☐	Are you currently meeting expectations?	
☐	What do they like about working with you?	
☐	Is there anything that you wish I was doing for you that I am not currently doing?	
☐	Is there anything that they don't like about working with you?	
☐	What do they like about your company?	
☐	What don't they like about your company?	
☐	Ask for a reference letter	
☐	Ask for a LinkedIn referral	
☐	Ask if you can use them as a reference	
☐	Ask for internal referrals: Depts., Divisions, related companies	
☐	Ask for external referrals: vendors, clients, competitors, local businesses, associations	
☐	Ask who they want introductions to	
☐	Find out their profile for their ideal client	
☐	Uncover other ways that you can help them with additional products or services	
☐	Assure that you will get their repeat business	
☐	Uncover strategic alliances – attorney, CPA	
☐	What is the next step that makes the most sense?	
☐	Express gratitude for any referrals or additional business	