



CLIENT VISIT CHECKLIST

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