

Client Profile: What we know and what we want to know

We should have a consistent cadence of conversations with our top clients. It is helpful to have a method of documenting what you learn in those conversations and creating a plan for other topics we should be curious about in future conversations.

Client Name: _____

What We Know

What do we know about the client's goals and priorities?

What do we know about the client's current challenges?

Who do we want to introduce them to?

What additional service needs might they have?

What ideas or solutions do we have for them?

What We Want to Know

What do we need to know to better understand the client's current situation?

What information do we need updated information regarding?

How could we improve the experience while delivering services to them?

Ask: What do you think is working well?

ASK: What could enhance the experience next time?

~~Transactions~~
↳ Experiences