

Beyond the Client worksheet

Date last reviewed: _____

Reviewed with: _____

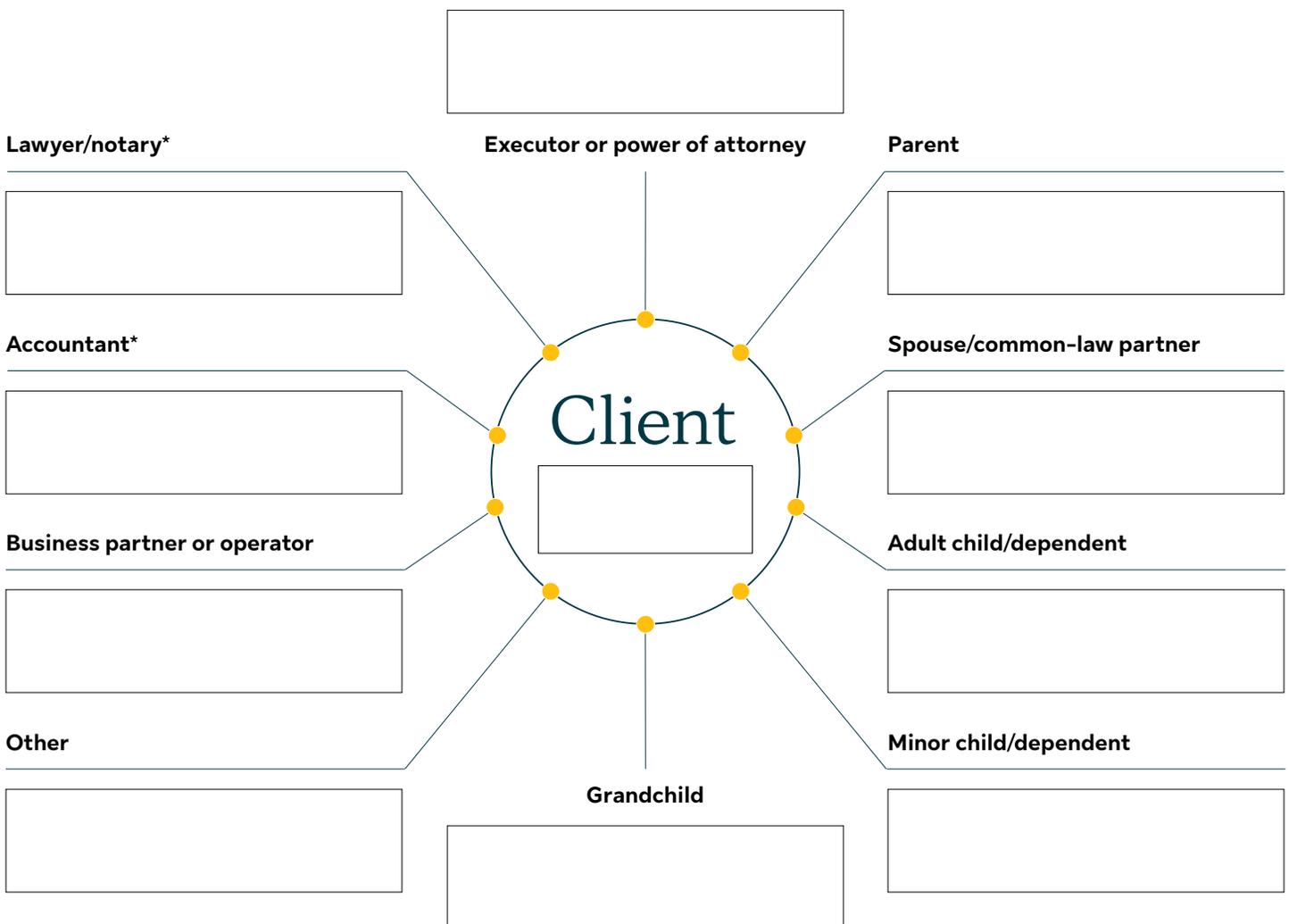
How to use this worksheet

Step 1: Complete the worksheet for a Client you work with. Add names and any other relevant information (company, phone numbers, address, etc.).

Step 2: Reflect on what gaps exist. Think about how you can ask for an introduction to these key contacts and what value you add.

Step 3: Identify the solutions, strategies, and products you would recommend for each of the Clients' key relationships.

Step 4: Transfer relevant info into your Client relationship management program (e.g. Salesforce) so you can automate future opportunities and reports.



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