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| 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 |  |