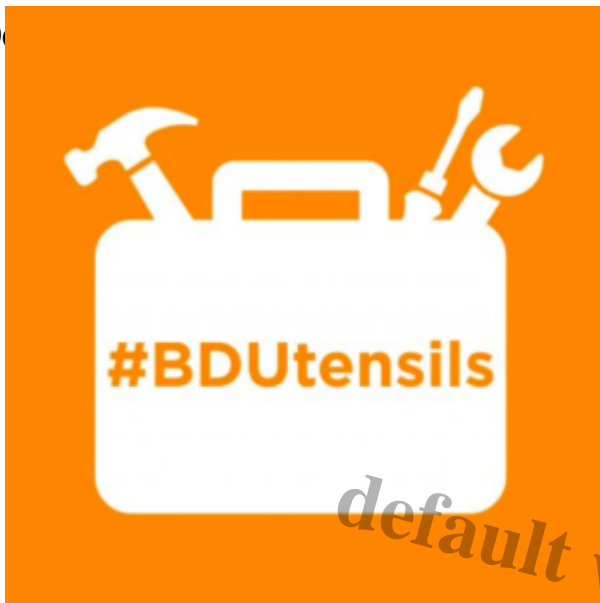


BDU Client Visit Checklist

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BDU believes that your clients are your gold and that you

need to maximize opportunities within your existing clients. This tool provides a comprehensive checklist of everything you might discuss and accomplish when talking to your client base.

Click on the resource below to download

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CLIENT VISIT CHECKLIST	
Questions/ Information to uncover	Notes
<input type="checkbox"/> Did you ask them about their current situation?	
<input type="checkbox"/> Did you ask them to provide additional details to 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 top 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: Clients, Existing, 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"/> Discover other ways that you can help them with additional products or services	
<input type="checkbox"/> Secure that you will get their repeat business	
<input type="checkbox"/> Discover 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	

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