

BDU CLIENT VISIT CHECKLIST

AREAS TO COVER	QUESTIONS TO ASK
PRE-CALL PLAN	Review profile, website, CRM and previous notes for key focus areas and takeaways
BUILD BUSINESS RAPPORT	"Fill me in on what's been happening in your world. How are you and your family?"
CONFIRM TIME/SET AGENDA	"We originally blocked out X time. Does that still work for you? Great! I know what I am hoping to do today but is there anything special you want to make sure that we talk about so that you feel it is time well spent?"
BUSINESS UPDATES	"Fill me in on what's been happening with you/your business? How are things going?"
KEY GOALS, PRIORITIES, INITIATIVES AND CHALLENGES	"What are some of your goals, priorities and initiatives for the upcoming year? What are you doing to address them? What is working/not working? What are some of the key challenges that you are facing? How is that affecting your business?"
LEVEL OF SATISFACTION	"Our relationship is very important to us and we always strive to exceed your expectations. Is there anything that we could be doing for you that we are not doing? Is there anything that you would like us to be doing better or differently?"
KEY BENEFITS OF WORKING TOGETHER	"If you were to describe the key benefits of our work together to someone else, what might you say?"
RECOMMENDATIONS/ TESTIMONIALS/ TESTIMONIAL LETTERS	If they compliment you... "Would you be so kind as to put what you just said in a LinkedIn recommendation for me?" or "Could you possibly put what you just said into a reference letter for me?"
COMMUNICATION	"What is the best way to reach you? How often?"
INTERNAL REFERRALS	"Is there anyone else within your company (other departments, divisions, locations, related companies) that you could introduce me to/that it would make sense for me to speak with?"
EXTERNAL REFERRALS	"Do you know of anyone else outside of your company that it might make sense for me to speak with to see if we might be able to help them out as well?"
COI/STRATEGIC ALLIANCES	"Are there any other vendors that you currently work with that you think would be good connections for me to speak with?"
NON-COMPETING VENDORS	"Are you unhappy with any of your existing vendors or looking for any new vendors?"
IDEAL PROSPECT/INTROS	"What does your ideal client look like? Who are you looking for introductions to?"
ASSOCIATIONS/CAUSES	"What are some associations/causes you are involved with? What type of events do they put on? Do you think it makes sense for me to get involved as well?"
SHARE OF THE WALLET	"Who else do you currently use or buy similar products/services from? How much do you currently spend each year on similar products/services? How do you decide who you are going to use for what? Would you be open to discussing how we might be able to help you more in the upcoming year?"
ADDITIONAL PRODUCTS/ SERVICES	"You mentioned _____. I have some ideas of how we might be able to help you _____."
DEFINED NEXT STEP	"Why don't we..."
EXPRESS APPRECIATION FOR THE CONVERSATION	"Thanks so much for taking the time today. I think we got a lot accomplished and I am looking forward to (defined next step)."