

Client Interview Planning Guide

Opening statement:

Example: *I really appreciate the opportunity to meet and share some of the things we're doing with our customers.*

Right up front, I'll tell you that we aren't always able to help everyone...but I'll try to give you all the information you need so that at the end of our meeting you can decide where we go from there.

Before we get started, would it make sense if I told you a little more about what we do?

I help businesses ... For example...

Establish Rapport:

Example: *How long have you been with the XXX Company?*

How are they currently accomplishing?

Example: *I was wondering...what experiences have you had with consulting firms in the past?*

What results are they getting?

Example: *So based on all of those experiences, what kinds of things are you doing now to...*

- *improve your business*
- *increase your sales*
- *improve communications*
- *reduce turnover*

Why would they change?

Example: *In the past, when you've brought in a consulting partner, or a new approach,. I'm curious...what were some of the reasons?*

Closing?

Example: *I really appreciate all of the time you've spent with me. When we first started talking, I told you that you'd be the one to decide where we go from here. I can tell you that I do have some ideas, based on the information you've given me. And I'd like to show them to you. Does that make sense?*