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Client Intelligence Assessment (CIA)

Potential New Client – Background Insight:

1. What is their ownership structure, when was the business founded and who are the key players within the firm?	
2. What is the enterprises mission, vision, values and selling proposition?	
3. What major developments / key initiatives are underway or have recently taken place within the firm?	
4. Does the company have an advisory board, and if so, who serves on it?	
5. Do they have a formalized strategic plan?	
6. Who are the predominant competitors in their space?	
7. Who are the firms trusted advisors?	
8. What other service providers might be able to offer insights into this company – i.e. – payroll, benefits advisor, IT firm, insurance agency, financial planning, and other outsourced providers?	
9. From social media and other sources – i.e. glassdoor, what are people saying about the organization?	
10. What causes, boards, affiliations and special interests of note are the owners of the business associated with?	

Potential New Client – Key Insights:

1. What type of insights and suggestions are you receiving from your present advisor?	
2. When was the last time your advisor referred a client opportunity to you?	
3. Can you describe any of the "above and beyond" ideas, innovations or best practices that have been shared with you?	
4. Do you think of your professional advisors as accelerators to the business? If not, what would they need to be doing differently?	
5. From a client delivery perspective, do you feel the responsiveness and access are meeting your expectations?	
6. Do you feel that you are properly informed about developments that can impact to your business and if so, is it being shared in a timely and understandable manner?	

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Client Review – Evaluation of Performance

1. How has your overall client experience been with our firm?	
2. Are we a service provider that is easy to do business with? What can we be doing better in this area?	
3. If we could improve one thing about our firm, what would that be?	
4. Is your current relationship manager meeting or exceeding your expectations? What one thing could he/she be doing to add further value?	
5. How well do we provide accurate, understandable and complete billing statements?	
6. Is our firm responsive and accessible on short notice?	
7. Do we do a sufficient job taking complex matters and explaining them so you understand?	
8. Can you describe how you measure our performance?	
9. Do you understand the full capabilities of our firm and if not, what can we be doing to highlight this?	
10. Based upon your overall experience with our firm, would you refer us to another company or business owner?	
11. If you were appointed managing director of our firm, what would you do differently?	

Client Review – Advancement Plan

1. What are the top business priorities and how can we be of potential assistance with this?	
2. What are you most concerning issues / challenges that can impact the business?	
3. From a people, process and system perspective, what are you looking to get accomplished?	
4. What is the most important contribution that we can make to you and your company?	
5. If we could refer a new client to you, what would we look for as an ideal fit?	
6. Where would you like our firm to assist you in the coming year?	
7. Given the nature of our network, do you need access to any type of organization, person or best practice that is outside our field of focus?	