

How Attractive and Valuable Is This Client?

| Selection Criteria | Description <small>*Note: These descriptions apply to one specific client you are evaluating</small> | How Would You Assess This Client? |
|------------------------------------|---|-----------------------------------|
| 1. Financial Return | High fees: This client relationship is ranked in the upper half of my client base in terms of attractiveness of fee levels achieved versus labor input. | |
| 2. Reputational Enhancement | Reputational value: This client is well-known and my work with them will enhance my own brand and appeal | |
| 3. IC Development | Interesting work: Through my work with this client I am continuing to develop and deepen my intellectual capital | |
| 4. Size and Potential | This client has the size, scale, and/or resources to invest in a long term relationship with me and afford my fees on an ongoing basis. | |
| 5. Relationship Orientation | This client has a long-term relationship orientation and a history of forming trusted partnerships with external advisors and service providers. | |
| 6. Strength of Leadership | There is strong, ambitious leadership at this company, and/or my own individual client is a talented leader who is determined to improve the organization and implement change. | |
| 7. Other Factors | For example: Fun, personal relationships, exotic or attractive client location, etc. | |

Summary:

- ⇒ Mostly 4s or 5s? A very good client
- ⇒ Mostly 3s with a few 4s? So-so—the fees need to justify the downside
- ⇒ Some 1s and 2s? A real question mark. Could be on your exit list