

How Well Do You Really Know Your Clients?

As a person

Level of Knowledge

Needs
Work

Strong

The Basics

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Spouse/partner, children |
| <input type="checkbox"/> | <input type="checkbox"/> | Other family: parents, siblings |
| <input type="checkbox"/> | <input type="checkbox"/> | Educational background |
| <input type="checkbox"/> | <input type="checkbox"/> | Where he/she grew up |
| <input type="checkbox"/> | <input type="checkbox"/> | Interests outside of work |
| <input type="checkbox"/> | <input type="checkbox"/> | Favourites: restaurant, author, movie, vacation etc. |

Deeper Knowledge

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Formative life experiences |
| <input type="checkbox"/> | <input type="checkbox"/> | Personal issues he/she may be grappling with |
| <input type="checkbox"/> | <input type="checkbox"/> | Non-profit or charitable involvement |
| <input type="checkbox"/> | <input type="checkbox"/> | Personal style: introvert vs. extrovert, detail oriented vs. focused on big picture, etc. |
| <input type="checkbox"/> | <input type="checkbox"/> | Risk tolerance |

As a professional

Level of Knowledge

Needs
Work

Strong

The Basics

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Preferred means of communication (e-mail, phone, face-to-face, etc.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Work style (early/late, weekends, etc.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Personal assistant: background, interests |
| <input type="checkbox"/> | <input type="checkbox"/> | Career history: accomplishments, positions held |
| <input type="checkbox"/> | <input type="checkbox"/> | Professional and alumni associations |
| <input type="checkbox"/> | <input type="checkbox"/> | Conference participation |

Deeper Knowledge

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Strengths and weaknesses as an executive |
| <input type="checkbox"/> | <input type="checkbox"/> | Role models, mentors |
| <input type="checkbox"/> | <input type="checkbox"/> | Career goals and aspirations |
| <input type="checkbox"/> | <input type="checkbox"/> | Most concerning issues right now |
| <input type="checkbox"/> | <input type="checkbox"/> | Quality of relationship with his or her boss |
| <input type="checkbox"/> | <input type="checkbox"/> | Relationships with key direct reports (do you know them?) |
| <input type="checkbox"/> | <input type="checkbox"/> | Corporate directorships, other affiliations |
| <input type="checkbox"/> | <input type="checkbox"/> | Other executives he/she associates with |
| <input type="checkbox"/> | <input type="checkbox"/> | Most important networks and relationships |