

How Strong Is Your Client Relationship?

Relationship Criteria	Description	How Would You Assess Yourself/This Relationship?
1. Trust	I enjoy strong professional and personal trust, which gives me the ability to work informally, autonomously, and without extensive controls or reporting. The client never feels I'm "selling."	
2. Transparency	There is ample and frequent communication between us. The client proactively shares a wide variety of information about plans, proposals, financial performance, and so on.	
3. Thought Leadership	The client looks to me for thought leadership in my area of expertise. I have wide-ranging discussions with my client about his business, and he looks to me for advice that goes well beyond the immediate project.	
4. Inner Circle	I am a trusted business advisor who has a "seat at the table" for important discussions in my area of expertise. The client will often bounce ideas off me and consult with me before making important decisions.	
5. Loyalty	My work with this client is almost always sole-sourced, and the client gives me visibility into potential future engagements. The client will invariably turn to me for engagements in my field of expertise.	
6. Referenceability	This client actively gives me referrals and/or would <i>enthusiastically</i> recommend me to friends and colleagues if asked.	

How Strong Is Your Client Relationship? (continued)

Note: Not every criteria on this page (Numbers 7-11) will apply, depending on the type of business you have and the nature of your service offerings)

Relationship Criteria	Description <small>*Note: These descriptions apply to one specific client relationship you are evaluating</small>	How Would You Assess Yourself/This Relationship?
7. Multiple Services	We provide this client with multiple services and serve it from multiple geographic locations	
8. Multiple Services	We provide this client with multiple services and serve it from multiple geographic locations	
9. Breadth of Relationships	We have built “many-to-many” relationships, at different levels, between our firm and the client’s organization. The institutional relationship could survive the departure of even a key executive who we work with.	
10. Relevance	We have a high “share of wallet” for this client’s needs in our area of expertise. We are strongly <i>relevant</i> to this client.	
11. Financial Return	Financially, this relationship is characterized by steady or increasing revenues, low volatility and risk, and low sales costs. The relationship meets our firm’s hurdle for financial performance.	