

## Questions to Ask Your Clients Every Year

1. Could you share with me your overall assessment of our relationship and our performance?
2. What have we done recently that you have found particularly valuable or useful?
3. If you could change or improve one thing about our relationship, what would it be?
4. Are there any individuals in your organization with whom we should invest more time and build a better relationship with?
5. Can you give me any suggestions for improving the amount, timing, or format of our communications to you and your organization?
6. What issues are coming up for you that we ought to be aware of or thinking about for you?
7. What are your plans for...? How are planning to deal with...? (tailor these to your client's business and markets)
8. What are your two or three most important goals for next year? (Or, even better: How will you be evaluated by your leadership next year? What metrics will be used?)
9. As you think about the future of your business, and your various strategies and initiatives, what are you most excited about? Most concerned about?
10. Is there anything we could improve upon or change that would make doing business with us easier?
11. Could you give me your assessment of our team? What have they done particularly well? Are there any areas for improvement or weakness I should be aware of?
12. If you need something from our organization, do you always know who to go to?