

How Well Do You Really Know Your Clients?

Client name: _____

THE BASICS

As a Person			As a Professional		
Level of knowledge			Level of knowledge		
Needs work	Good		Needs work	Good	
<input type="checkbox"/>	<input type="checkbox"/>	Spouse/partner, children	<input type="checkbox"/>	<input type="checkbox"/>	Preferred means of communication (e-mail, phone, face-to-face, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	Other family: parents, siblings	<input type="checkbox"/>	<input type="checkbox"/>	Work style (early/late, weekends, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	Educational background	<input type="checkbox"/>	<input type="checkbox"/>	Personal assistant: background, interests
<input type="checkbox"/>	<input type="checkbox"/>	Where he/she grew up	<input type="checkbox"/>	<input type="checkbox"/>	Career history: accomplishments, positions held
<input type="checkbox"/>	<input type="checkbox"/>	Interests outside of work	<input type="checkbox"/>	<input type="checkbox"/>	Professional and alumni associations
<input type="checkbox"/>	<input type="checkbox"/>	Favorites: restaurant, author, movie, vacation, etc.	<input type="checkbox"/>	<input type="checkbox"/>	Conference participation

DEEPER KNOWLEDGE

As a Person			As a Professional		
Level of knowledge			Level of knowledge		
Needs work	Good		Needs work	Good	
<input type="checkbox"/>	<input type="checkbox"/>	Formative life experiences	<input type="checkbox"/>	<input type="checkbox"/>	Strengths and weaknesses as an executive
<input type="checkbox"/>	<input type="checkbox"/>	Personal issues he/she may be grappling with	<input type="checkbox"/>	<input type="checkbox"/>	Role models, mentors
<input type="checkbox"/>	<input type="checkbox"/>	Non-profit or charitable involvement	<input type="checkbox"/>	<input type="checkbox"/>	Career goals and aspirations
<input type="checkbox"/>	<input type="checkbox"/>	Personal style: introvert vs. extrovert; detail oriented vs. focused on the big picture, etc.	<input type="checkbox"/>	<input type="checkbox"/>	Most concerning issues right now
<input type="checkbox"/>	<input type="checkbox"/>	Risk tolerance	<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