

Client Relationship Engagement Plan

Date _____
 Client _____
 Individual Name _____
 Position _____

I. Current Relationship Level and Goal* (place an x)

	1	2	3	4	5
	Don't Know Them Yet	Met a Few Times	Good Working Relationship	Very Strong Relationship	Trusted Advisor
Current Level					
Goal in 12 Months					

II. Business Agenda of 3-5 Critical Priorities, Needs, or Goals

1. _____
2. _____
3. _____
4. _____
5. _____

Rate Your Understanding

Don't know their agenda
 Moderate understanding
 Thorough knowledge

1 2 3 4 5

III. Personal Agenda (career, self, network, family, etc.)

1. _____
2. _____
3. _____

Don't know their agenda
 Moderate understanding
 Thorough knowledge

1 2 3 4 5

IV. Adding Value to this Relationship

Given this person's business and personal agenda, how can you add value along these four dimensions: Thought Leadership (ideas and content), Network, Personal Help, and Fun.

Thought Leadership (what relevant ideas and content can you share?)

1. _____
2. _____
3. _____
4. _____

Network (what valuable introductions can you make?)

1. _____
2. _____
3. _____
4. _____

Personal Help (how can you help them with their personal agenda or with a need they have in their personal lives?)

1. _____
2. _____
3. _____
4. _____

Fun (is there something outside of work you could engage in?)

1. _____
2. _____
3. _____
4. _____

V. Action Plan to Develop This Relationship Over the Next Two Quarters

Month 1	Month 2	Month 3
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
Month 4	Month 5	Month 6
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____