Identity and prioritize tool

Really get to know your client by listening to understand and identify their needs by acting as a Trusted Client Adviser. Use the sample questions listed below to ensure that you ask the right questions. From the information gathered from the Research tactics checklist, tailor a list of open-ended questions that addresses the specific client and that are pertinent to the specifics of their business. See where you can help, then prioritize.

- What keeps you awake at night?
- Does your business operate efficiently?
- What are your current business concerns?
- Is there any pending litigation affecting your business?
- Are you on track with your strategic plan?
- How are you managing and developing your personnel?
- Do you have a succession plan?
- Do you feel as if you offer a competitive advantage?
- Do you have adequate cash flow to support anticipated growth?
- Name the positive and negative aspects of your business.
- Do you have a personal financial plan?
- How do you implement technology?
- Will your marketing approach achieve your desired goals?
- Do you regularly review your financial status?
- What is your current accounting system?
- Do you have adequate insurance?
- Beyond typical accounting work, what are other services you need?

What are the current projects or items of concern identified from the questions?	On which concerns and projects could I be of assistance? Prioritize.

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