# HOW TO GET MORE WORK FROM EXISTING CLIENTS

Use this form to build a profile of your target client, identify problems you can solve and value you can add.

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| BACKGROUND | | | | | | | | | | | |
| ***Client name*** |  | | | | | ***Relationship owner*** | | | |  | |
| ***Length of relationship*** |  | | | | |
| ***Estimated annual revenue*** |  | | | ***Estimated annual gross profit*** | | |  | ***Estimated annual gross profit %*** | | |  |
| ***Who is the influencer/ decision maker/ financial owner?*** | | | | |  | | | | | | |
| ***What is their purpose? Their reason for being?*** | |  | | | ***What do they make/sell/do?*** | | | |  | | |
| ***How do they make/source their money?*** | |  | | | ***What are their major costs?*** | | | |  | | |
| ***Consider their business, industry, and sector:*** | | | | | | | | | | | |
| * *overarching trends* | | |  | | | | | | | | |
| * *their power as a supplier and as a consumer* | | |  | | | | | | | | |
| * *their competitors* | | |  | | | | | | | | |
| * *role of government/ regulators.* | | |  | | | | | | | | |

|  |  |
| --- | --- |
| OUR CURRENT WORK | |
| ***From their perspective, what is it that we do?*** |  |
| ***What does it achieve for them?*** |  |
| ***Where else can they source services similar to ours?*** |  |
| ***Why do they buy services from us, rather than our competitors?*** |  |

*\*Use additional copies of the table below, as required.*

|  |  |  |  |
| --- | --- | --- | --- |
| ADDING VALUE – INITIATIVE #1 | | | |
| ***What else can we do for them? What exactly?*** |  | | |
| ***What will it achieve?*** |  | | |
| ***Are they doing it already?*** |  | ***Do they not yet do it? Why?*** |  |
| ***What is the deliverable?*** |  | ***What is the timeframe?*** |  |
| ***How will we measure and report on it?*** |  | | |
| ADDING VALUE – INITIATIVE #2 | | | |
| ***What else can we do for them? What exactly?*** |  | | |
| ***What will it achieve?*** |  | | |
| ***Are they doing it already?*** |  | ***Do they not yet do it? Why?*** |  |
| ***What is the deliverable?*** |  | ***What is the timeframe?*** |  |
| ***How will we measure and report on it?*** |  | | |

# J:\!JMA MARKETING\SOCIAL MEDIA\Client - female.pngHOW WELL DO WE KNOW OUR CLIENT?

|  |  |  |
| --- | --- | --- |
| As a professional… | | |
|  |  | **Notes** |
| Preferred means of communication (e-mail, phone, face-to-face) |  |  |
| Work style (early/late in the day, weekends) |  |  |
| Name of personal assistant |  |  |
| Role models and mentors |  |  |
| Career history including positions held and major accomplishments |  |  |
| Career goals and aspirations |  |  |
| Most concerning issues right now |  |  |
| Quality of relationship with his/her boss |  |  |
| Relationships with key direct reports (and do you know them?) |  |  |
| Memberships with professional associations |  |  |
| Conference participation |  |  |
| Corporate directorships |  |  |
| Other top executives he/she associates with |  |  |
| Networks he/she is active in |  |  |
| Awards he/she has won |  |  |

## J:\!JMA MARKETING\SOCIAL MEDIA\Client - male.pngHOW WELL DO WE KNOW OUR CLIENT? CONT.

|  |  |  |
| --- | --- | --- |
| As a person… | | |
|  |  | **Notes** |
| Family background including spouse or partner, children, parents |  |  |
| Educational background |  |  |
| Formative life experiences |  |  |
| Where he/she grew up |  |  |
| Hobbies and interests including destinations, books, films, sports teams, restaurants |  |  |
| Personal issues he/she may be grappling with |  |  |
| Not-for-profit or charitable involvement |  |  |
| Personal style: introvert vs. extrovert, safety first vs. risk taker. |  |  |

*Get in touch and find out how we can help with increasing your share of work from existing clients.*

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