Bring your own client worksheet

During the *Succeeding as a Business Advisor* course, you are working with the client UltraSys. Later in the course, you will have the opportunity to apply the business advisor skills to understand more about *your own* client.

For this activity, think of a specific individual at a client company you are either working with or wish to work with. What are the company's issues and priorities? How can you establish or further develop your relationship with this individual? What questions would you ask?

Please take the time assigned to complete the information below. Write legibly so others will be able to read your input. When requested, please return this worksheet to your facilitator.

Partner for L05 activity	Leave blank
Your name	
Your TAS sub-service line	
Your Social Style	
Your client company name and sector	
Client company familiarity with EY (High/Medium/Low/None)	
Issues, strategic objectives and priorities for this company	
Your client contact's name and title	
Client's social style (if known) and other relevant personal information such as	

familiarity with EY	
Your meeting objective(s) if you were to secure a client meeting	
What you know or wish to know about this client contact's personal agenda	
What questions would you ask this client?	
Are there insights to share or a POV to test with this client? If so, describe.	
What would be potential next steps with this client contact?	

