

# Client Briefing Checklist

Before ending the client briefing session, make sure we have all the answers to the following questions:

QUESTION	ANSWERED?	REMARKS
<b>THE OBJECTIVE</b>		
Is marketing objective to grow market share OR to grow the size of total market?	<input type="checkbox"/>	
Is the source of business users OR non-users?	<input type="checkbox"/>	
Has there been any activities in the past trying to achieve the same objective and source of business?	<input type="checkbox"/>	
<b>THE PATH TO PURCHASE</b>		
Are the buyers same with OR different than the end-users?	<input type="checkbox"/>	
When and where do people usually start realizing they need the category?	<input type="checkbox"/>	
What are the steps do people usually take to get the product/service?	<input type="checkbox"/>	
Who can influence people about the way they make choices?	<input type="checkbox"/>	
What final steps do people take to actually acquire the product/category?	<input type="checkbox"/>	
Are the others who share in the act of consumption?	<input type="checkbox"/>	
<b>THE BRAND</b>		
What is the "for..." part of the brand positioning?	<input type="checkbox"/>	
What is the "only..." part of the brand positioning?	<input type="checkbox"/>	
What the "because..." part of the brand positioning?	<input type="checkbox"/>	
Are the current brand associations different than the intended?	<input type="checkbox"/>	
<b>THE PRODUCT/SERVICE</b>		
What does the product do better than its competitors?	<input type="checkbox"/>	
How different is the product's price from competitors?	<input type="checkbox"/>	
<b>THE PREVIOUS COMMUNICATION</b>		
Has there been a consistent unifying theme or platform?	<input type="checkbox"/>	
Are there non-negotiable mandatory elements?	<input type="checkbox"/>	
<b>THE LOGISTIC</b>		
What is the budget and how is it split up?	<input type="checkbox"/>	
Are the dates for important milestones agreed?	<input type="checkbox"/>	
Are the ones who wrote the brief different that the one who'll approve the proposal?	<input type="checkbox"/>	
Who influences the approver of the proposal?	<input type="checkbox"/>	

This checklist is developed by Paramita Mohamad ([paramita.mohamad@gmail.com](mailto:paramita.mohamad@gmail.com)).

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This checklist is not intended to be a teaching tool or an algorithm.

Additions and modifications to fit local practice are encouraged.

# Keeping Service New Client Checklist

**Sally J. Schmidt**



## **Keeping Service New Client Checklist:**

*Good Practice Guide* Richard Brindley, 2021-12-24 Professionalism is not automatic with qualification It is decided by the manner in which you carry out your professional life the conduct and qualities that you bring to your role In architecture it is founded on the principles of honesty integrity and competence and a concern for the environment and others As a trusted expert it is essential that you gain respect for your skills and knowledge while maintaining veracity and transparency in your relationships and dealings with clients end users design and construction professionals and the wider public With a focus on professional judgement this book is a personal guide on how to be a self aware and successful practitioner aspiring to best practice It will give you the confidence to create meaningful industry connections and handle contractual disputes insurance and negligence claims while maintaining a high standard of conduct By paying attention to business planning financial processes good management and effective communication it will help you to protect your practice s reputation and increase profitability and cashflow Ultimately it will enable you to not only avoid professional pitfalls but to benefit from positive working relationships

**Ultimate Small Business Marketing Guide** James Stephenson, 2007-01-01 The second edition of this comprehensive guide introduces new marketing advertising sales and public relations techniques to the 1 500 proven ideas from the first edition It adds dozens of new high tech strategies required to stay one step ahead in today s highly competitive global marketplace Off and online resources have been updated and new ones including blogs and new websites have been added

How to Get, Build & Keep Your Clientele Mary Carver-Goldring, Stella Carver, 2015-06-15 This is the guide booklet youve been waiting for to help you get on the right track to beauty service success Mary Carver Goldring is a successful senior cosmetologist and salon owner for more than forty five years and she is sharing her tricks of the trade with you

**Start Your Own Senior Services Business** Entrepreneur Press, Charlene Davis, 2014-08-18 The senior population is multiplying by the millions In fact during the next 25 years the senior population in America is expected to double growing faster than the total population in every state This means one thing a tremendous opportunity for aspiring and compassionate entrepreneurs From providing adult daycare or homecare to transportation or concierge needs this guide covers today s most requested services within the 65 and older market Readers learn step by step how to choose the right opportunity for them legally and financially establish their business acquire licenses and certifications set policies and procedures and much more Priceless insight advice and tips from practicing senior care professionals help aspiring entrepreneurs to discover their specialty from within one of six growing areas of interest adult daycare relocation services homecare transportation services concierge and travel service design a business to suit customers demographics and special needs set rates create a support staff who will facilitate success use effective marketing and advertising to get the word out build valuable business partnerships that lead to referrals and plan for future growth A record number of seniors are seeking help and this guide is the key to starting a senior care service today

How to Capture and Keep Clients Jennifer J. Rose, 2005 In this new in

depth book the best and most innovative solo and small firm lawyers give you their secrets approaches and strategies to that age old puzzle of growing your law firm Through this wealth of savvy advice you ll learn how to ask for business attract and keep clients partner with other lawyers build a virtual law firm use technology in client development brand your law firm and much more

*The Beginner's Guide to Starting a Home Cleaning Service* Barrett Williams, ChatGPT, 2024-11-12 Unlock the door to entrepreneurial success with *The Beginner's Guide to Starting a Home Cleaning Service* This comprehensive eBook is your roadmap to building a thriving home based business in a flourishing industry Whether you re looking to break free from the 9 to 5 grind or add a new revenue stream this guide will empower you to turn a simple idea into a profitable reality Dive into the essentials of the home cleaning industry with a detailed introduction that demystifies market dynamics and reveals the numerous benefits of setting up a business from the comfort of your home Discover how to find your niche and stand out with a unique selling proposition and learn strategies to tap into eco friendly cleaning a burgeoning trend among eco conscious consumers Craft a robust business plan with sections dedicated to financial projections resource management and legal essentials Navigate through the intricacies of taxes licensing and insurance to set a solid foundation for your business operations The book walks you through the process of designing compelling service offerings and choosing a pricing model that reflects the value you provide Unlock the secrets of effective brand building marketing strategies and establishing a powerful online presence to draw in customers From mastering local advertising techniques to leveraging social media this guide offers actionable insights to boost your visibility and reputation Efficient operations and stellar customer management are key and you ll find expert advice on scheduling training and quality control Discover how to drive growth by scaling your business expanding service areas and tracking key performance indicators Gain inspiration from real life case studies and learn how to navigate challenges and seize opportunities for continuous improvement This eBook prepares you for the future of home cleaning services highlighting emerging trends and sustainable innovations that will keep your business ahead of the curve Start your journey today and transform your passion for cleanliness into a booming business venture

*Train Customer Service Reps for Success* Rachel Armstrong, 2014-10-24 Customers now have many ways to get in touch with companies whether via phone and email or social media and online chats They have expectations and organizations need to meet those demands to remain competitive In this issue of TD at Work Rachel Armstrong details how talent development professionals can ensure that customer service teams are providing customer experiences that meet high standards She details The skills customer service teams need to meet customers expectations Techniques for training new hires for those skills Methods to effectively support customer service reps after the training program Ways to prepare reps for the future Tools and resources included in this issue are a needs assessment checklist and blended learning ideas and planning charts

**The Sweaty Startup Guide to House Cleaning** Barrett Williams, ChatGPT, 2024-12-07 Unlock the door to prestigious opportunities with *The Sweaty Startup Guide to House Cleaning* your ultimate roadmap to launching and scaling

a reputable luxury home cleaning service This comprehensive guide will take you from a dreamer to a successful entrepreneur in the high demand cleaning industry offering transformative insights and practical strategies for navigating this lucrative market Begin your journey with a deep dive into the house cleaning industry s landscape understanding its unique challenges and rewards Learn to craft a robust business plan tailored to your ambitious goals ensuring you re equipped with a financial strategy that propels growth Discover the art of defining your niche by tapping into the burgeoning luxury market where customizing services to meet affluent clients exacting standards opens the door to premium pricing Delve into expert techniques for building a standout brand that resonates with high end clients From designing a distinct logo to establishing a strong online presence each step will set you apart in a competitive market Master the intricacies of pricing strategies understanding how to package value driven services that attract discerning customers while optimizing your profit margins Marketing in the luxury space requires finesse learn to navigate this realm with targeted advertising strategic networking and savvy social media usage Build a top tier team trained to deliver excellence and foster a client friendly culture that transforms first time customers into loyal patrons Explore essential legal financial and technological considerations equipping you with the tools needed for seamless operations and sustainable growth Packed with case studies and real world success stories this guide demonstrates how to overcome challenges with innovative solutions Begin your entrepreneurial journey today with *The Sweaty Startup Guide to House Cleaning* and lay the foundation for lasting success in the luxury home cleaning industry Your path to a thriving business and fulfilling work life balance starts here

**Getting Clients and Keeping Clients for Your Service Business** M. D. Weems, 2008 Many books are written on how to attract more business for retail stores or new products but this is the only book written for the small business service provider Whether you are an attorney doctor accountant consultant personal trainer insurance agent Web or computer consultant graphic designer dentist landscape or pool caretaker professional cleaner wedding planner tree trimmer caterer or pet sitter this book is for you The truth is unless you keep a steady stream of clients coming through your doors you will never be as successful as you would really like to be If you re great at working with clients and you do an excellent job of providing your services you have the capability to turn your service business into a highly profitable firm easily If you are like most small business service providers getting and keeping new clients is hard work and takes up most of your time And it is a big challenge Yet this was not the reason you went into business You went into business to assist your customers and make a financially rewarding business for yourself This new book will guide you back to your original goals for going into business while making your life easier Developing a low cost proven marketing system doesn t have to be difficult or time consuming This book details the principles and practices of marketing for the professional service business In 30 days or less you will be so successful in attracting all the business you will ever need that you can select the clients you want to serve This specialized book will demonstrate methodically how to market and promote your services easily inexpensively and most

important profitably You will learn how to find new business clients quickly and keep existing ones satisfied by selling client based solutions and services by putting technology and low cost marketing devices into place that take little or no time on your part You will learn to develop a marketing plan with hundreds of practical marketing ideas to help successful service providers attract new clients and increase business with existing ones Atlantic Publishing is a small independent publishing company based in Ocala Florida Founded over twenty years ago in the company president e tm s garage Atlantic Publishing has grown to become a renowned resource for non fiction books Today over 450 titles are in print covering subjects such as small business healthy living management finance careers and real estate Atlantic Publishing prides itself on producing award winning high quality manuals that give readers up to date pertinent information real world examples and case studies with expert advice Every book has resources contact information and web sites of the products or companies discussed

**Record Keeping** ,1984      **Designing and Delivering Superior Customer Value** Art Weinstein,1999-06-24 Great companies don t just satisfy their customers they strive to delight and amaze them Designing and Delivering Superior Customer Value explains how to continually create customer experiences that exceed expectations This turns buyers try ers into lifetime customers The emerging value paradigm is not only a new way to think about marketing but a new business imperative in the 21st century It is the strategic driver that differentiates great companies from the pack Value connotes many meanings yet it is always defined by the customer This book stresses the service aspects of an organization especially customer service marketing and organizational responsiveness and how to create and provide outstanding customer value to the target market s With the integrated management perspective used by the authors you will understand how to blend the delivery of service and quality together with pricing strategies to maximize the value proposition Those companies that embrace customer driven value creating methods will gain a competitive edge in the 21st century those that do not will experience declines This exciting new book is a guide to retaining your existing customers and to gaining loyal new customers Features      *Business Development for Lawyers* Sally J. Schmidt,2006 Whether you re launching a practice or trying to expand your book of business this new guide gives you the help you seek From developing a reputation to developing relationships from retaining existing clients to generating new business *Business Development for Lawyers Strategies for Getting and Keeping Clients* examines all the available techniques providing you with the expert insights and practical tips you need to make them work for you You ll learn how to write for publications make effective presentations network handle the media get results from participating in conferences and social events follow up with contacts build relationships with referral sources close the deal with prospective clients and more This new book from a leading law firm marketer and consultant is an excellent starting point for anyone developing a personal marketing plan or for the lawyer who wants to improve personal marketing and business development skills      *Essential Case Management* Peter G. Kohleis,Peter Kohleis Pty Limited,2009      *Building Your Ideal Private Practice: A Guide for Therapists and Other Healing Professionals*

Lynn Grodzki, 2000-04-17 Would you like to Make more money in your private practice Attract more ideal clients Generate a flow of quality referrals Revitalize your existing practice Have increased confidence as a business owner In this book psychotherapist and business coach Lynn Grodzki acts as your personal business coach and shows you how to build an ideal private practice one that is both highly profitable and personally satisfying Today being a talented professional is not enough to ensure the success of your private practice you also need to be an enthusiastic talented businessperson Grodzki's business strategies are effective and immediately useful for a wide range of private practitioners including social workers psychologists psychiatrists massage therapists energy healers life coaches and chiropractors Whether you are just starting out as an independent practitioner or looking to revitalize an existing practice Building Your Ideal Private Practice provides a foundation for business and personal growth that will lead you to a new level of personal and financial enrichment Presenting innovative business concepts in a format specifically adapted for the therapeutic profession this book guides professionals at all stages of their careers Bringing together years of experience and the key elements from her Private Practice Success Program with an easy and accessible writing style Grodzki's book will help you not only build a successful practice outside managed care but also ensure that your business reflects your true values and talents *Marketing Management*

Dr. Ravichandran Velusamy, 2024-01-11 Dr Ravichandran Velusamy Assistant Professor Department of Business

Administration Dr Kalaignar Government Arts College Kulithalai Tamil Nadu India Make Money from Home: Drew

Anderson, 2025-08-14 Make Money From Home Tired of long commutes limited income or feeling stuck in a job that doesn't offer freedom or fulfillment It's time to take control of your future and learn how thousands of people are creating sustainable income streams right from their living rooms bedrooms and kitchen tables Whether you're just starting out or ready to level up this book is your essential guide to building real income from home using proven practical strategies Make Money From Home breaks down the tools tactics and mindsets needed to thrive in the digital economy It's not about overnight success it's about real methods that you can implement at your own pace based on your strengths and lifestyle From freelancing and remote customer service to blogging teaching online or launching a product every chapter walks you through the steps to start grow and scale Inside This Book You'll Discover The New Age of Remote Income and what it means for your future How to create a productive and focused home workspace Why freelancing is the perfect entry point and how to succeed at it What it takes to launch and grow a YouTube channel or blog for profit Step by step guidance on selling products online from handmade goods to dropshipping The fundamentals of affiliate marketing and how to do it right Simple methods for turning your skills into high paying online teaching opportunities Each chapter is crafted to be clear practical and focused on results You'll learn how to protect yourself from online scams manage your time effectively and even scale your side hustle into a full time income No fluff just the tools you need to take your first steps and keep going Whether you're a stay at home parent a student an employee looking for extra income or someone who wants to break free from the

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