

Identifying Business Owner Clients

In this exercise you will list out your top 10 business owner clients and the current business they have with you. In addition, you will provide three data points for each owner.

- **Date last engaged:** when was the last time you contacted / engaged with this business owner to discuss your services?
- **Relationship score:** how strong of a relationship do you have with this owner? (1= lowest, 6=highest)
- **Opportunity score:** based on what you know about this owner / business, what is the revenue opportunity? (1= lowest, 6=highest)

This exercise will help you prioritize which clients you will approach first to re-engage with you in a connected business and personal planning conversation.

| <u>Owner Name</u> | <u>Business Name</u> | <u>Current Business with You (Yes or No)</u> | | | | | <u>Date last engaged</u> | <u>Relationship Score</u> | <u>Opportunity Score</u> |
|-------------------|----------------------|--|---------------------------|---------------------------|------------|-----------------------------|--------------------------|---------------------------|--------------------------|
| | | <u>Financial Planning</u> | <u>Personal Insurance</u> | <u>Business Insurance</u> | <u>AUM</u> | <u>401(k) or Other Plan</u> | | | |
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