Articulating Your Core Client Process

Use this worksheet to jog your thinking about key elements that should be included as part of your Core Client Process.

This exercise can be done on using a blank sheet of paper, index cards, a word processing document, written MindMap or MindMapping software (my favorite).

Here's how to do this exercise:
Think of your best client. If you don't have any clients yet, imagine your ideal client.

Then start answering the following questions...

What's the first question you usually ask a potential or new client?

What 's the most revealing question you usually ask a potential or new client?

What are the critical things you need to know to make a "diagnosis"? What questions do you ask to obtain that information?

Do you have a questionnaire, survey, quiz, or profile that you have them complete? If not, would you like to? If so, describe it.

Are there any distinct phases that your clients deal with or priorities that they have?

What are visual and descriptive models, structures, frameworks, or processes that you draw out that would help your clients to learn, feel reassured, or gain clarity?

How do you go about helping a client turn chaos and confusion into order?

Can describe or draw any models, philosophies, styles, technologies, and/or processes that sets you apart from others in your field?

What questions do you ask and what do you look for to find out what your client's real problems are, what their real frustrations and desires are?

What visual, auditory, and/or sensory triggers tend to get your clients attention? Angry? Frustrated?

What are blind spots that your clients commonly have? What do you do to help your clients see them and address them?

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What is missing from your clients' lives and/or businesses, that is causing problems? How do you address these issues at the "root cause" level?

What's the first thing you do when you work with a client?

What's the second thing you do when you work with a client?

And what's the next thing after that? (In my own personal experience, after I write down that first step, I go back and think: That's not really where I start, where I really start is …. (a few steps earlier.)

Now, list out steps to your Core Client Process. (See if you can come up with anywhere from 5-12 key elements or steps).

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