

Stimulating Client Relationships

Tim W. Hrastar Associates Rapport Marketing®

Purpose: To help the client achieve success! Get additional and new business from the client by thinking ahead of them. Use this form to stimulate ideas and action steps. Complete a form for each contact in the organization, after all different contacts have different needs and connections.

Name _____ **Client** _____ **Date** _____

Phone _____ **Email** _____

Current Services Provided: What services are you currently providing the client and contact?

Possible Needs: Put yourself in their head and heart and think about challenges they have that must be met in order for them to achieve success. How does this contact win personally?

Ideas to Help Them: Think of things you can help them implement to meet their needs, exceed their expectations, and achieve success.

Questions to Ask: Write at least three (open-ended) questions to ask them for more information.

Networking/Referral Connections: Who can you connect them with in your network, and who can they connect you with in their network, including their organization. Give a referral and ask for a referral.

Action Steps: Using action steps advances the relationship. Example: Make a phone call to set a lunch appointment to discuss these issues, and ask the questions.



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184 Abbey Drive • Springboro, OH 45066 • Voice/Fax: 937-886-0186 • E-mail: tw@rapportmarketing.com • Web: www.rapportmarketing.com