**Planning for Client Leadership**

***Client***

Who are our primary day-to-day contacts?

Who else do we know in the client’s organization?

Who do we need to meet in the client’s organization?

With whom do we need to improve our relationship?

Who are the key outside influences on our client?

***State of the Relationship***

*Rate each 1 – 10, with 10 being best. Write an explanation for any rating under 8.*

What is the client’s overall opinion of our agency?

Is our work for the client measurably effective?

What is the client’s opinion of our creative product?

What is the client’s opinion of our public relations services? Of our media strategies and execution? Of our interactive work? *(List and rate all the services you provide for this client.)*

What is the client’s opinion of how we manage our relationship with them?

What is the state of our financial relationship?

***Opportunities***

What new needs might our client have in the coming year?

What do we know about the client’s industry that might suggest new opportunities for us?

What new opportunities exist in other departments or divisions of the client’s company?

Are there opportunities to pitch new business in our client’s industry or related industries?

***Potential Threats***

What situations within the client’s organization could adversely affect our relationship?

What business or industry conditions could adversely affect our relationship?

Are there any other sources of possible threats?

***Goals***

What is our annual income from this client? What percent change do we seek next year?

What existing programs can be expanded or improved this year?

What new strategies should we introduce to the client?

What new initiatives should we explore with this client?

What compensation issues need to be resolved?

What relationship issues need to be resolved?

***Action Steps***

What is needed to achieve our goals? (Include at least one action step per goal.)