LivePlan by Palo Alto Software

The LivePlan Method: Client Engagement

A collection of questions to ask during the Kickoff phase of The LivePlan Method for Strategic Advising. This engagement establishes your strategic advisory relationship.

The LivePlan Method: Kickoff conversation

These conversation scripts guide the advisor through talking points to better understand the client and their business. The advisor should be focused on learning the client's broad business goals and what motivates them. This information will be leveraged in the next phase, Planning.

Client Engagement Script:

Tell me about your business. What do you sell?

If you could change one thing about your business today, what would it be?

What about your business are you the most optimistic about?

What worries you about your business?

What are your business and personal goals? How do they align?

Of the major things you sell, do you know which ones make a profit and which don't?

How do you make spending decisions now?

Do you know if you can afford to give yourself a raise in six months? Would you like to?

At the end of this session the advisor should know:

Business owners broad goal(s)

A differentiator about their business

What the owner knows and doesn't know about strategic business planning

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