

## WEEK 1

### Choose the Right Clients

- ✓ First, read or listen to **Week 1: Choose Your Target** in *It Starts with Clients* (pages 11-20 in the hardcover version)

It's vastly easier to build clients for life if you start with the right clients to begin with. During Week 1 of the Challenge, I want you to think about your client selection criteria, and how many of your current clients match them.

#### Part 1

Briefly list or describe your Strategic, Relational, and Impact criteria for selecting clients? (these are described in Week 1 of *It Starts with Clients*).

**Strategic** (the right type of client)

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**Relational** (forms healthy relationships with providers)

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**Impact** (you can have a positive impact on their business)

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#### Part 2

On the next page, rate your current clients against each of these three factors: Strategic fit, Relational fit, and potential for client Impact.

## Assignment

### Challenge: Rate Your Current Clients

In this exercise, you'll assess your current client relationships against the three factors: Strategic fit, Relational fit, and the potential for client Impact.

**Instructions:** Rate up to 12 clients in the table, below. What do the results tell you about your current clients and changes you'd like to make in your client portfolio? I haven't asked you to average the ratings because the three factors are not necessarily equally important for each client. Note: 1=Low, 2=Average, 3=High. What do your ratings tell you? What actions might you take, based on this assessment?

Client Name	Strategic Fit			Relational Fit			Potential for Impact		
	Low	Average	High	Low	Average	High	Low	Average	High
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3
	1	2	3	1	2	3	1	2	3