

CLIENT FACT SHEET

Basic Info on Client

- 1 What is the organ structure of all key decision makers and contacts?
- 2 What is the client's business both at group level and the division that purchased our goods and services?
- 3 What market are they trying to dominate?
- 4 Any recent press coverage relevant to your industry?
- 5 Any change to their management structure recently?
- 6 What products do they sell?
- 7 Do they participate in trade shows?
- 8 Who do they compete against?
- 9 Does the division have a mission statement
- 10 Who do they sell to?
- 11 What job openings do they list?
- 12 Are they hiring?
- 13 Why do they say clients should buy from them?
- 14 Is the facility aligned with trade organizations?
- 15 Does the business have industry certifications? Eg ISO
- 16 Are they expanding at this facility?
- 17 Does the business provide product or service internationally?

Info on your Services sold to date and their experience

- 18 What services have they bought and why?
- 19 Have we met the client face to face?
- 20 When was the last time they were trained?
- 21 What client support issues have arisen if any?
- 22 What was their experience of our client support team?
- 23 How do they rate the performance of goods and service?
- 24 Are there any features or additional services they would like to see?
- 25 Do they receive blog posts and technical content from us and are they happy with the quality?



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