## TRUSTED CLIENT ADVISER WORKSHOP

## INITIATE

Really get to know your client by listening to understand and identify their needs by acting as a Trusted Client Adviser. Use the sample questions listed below to ensure that you ask the right questions. From the information gathered from the **Research Tactics Checklist**, tailor a list of open-ended questions that addresses the specific client and that are pertinent to the specifics of their business. See where you can help, then prioritize.



PCPS

What are the current projects or items of concern identified from the questions?	
>	>
>	>
>	>
>	>
	>
	>
	≻