

Relationship Strategy Planner



Relationship name ▶▶

Years in business ▶▶

Brief description ▶▶

Select industry ▶▶ Professional practice Manufacturing Service Medical Non-profit

Associated entities ▼

Client decision makers ▶▶

Role ▶▶

External influencers ▶▶

Accounting firm ▶▶

Law ▶▶

Life cycle stage: Start-up _____ Growth _____ Mature _____ Decline/Renewal _____

Ownership type: Corporation _____ LLC _____ Partnership _____ Sole Proprietorship _____

Annual sales: <\$5M _____ \$5M-\$10M _____ \$10M-\$25M _____ \$25-\$100M _____ >\$100M _____

Employees: <10 _____ 10-25 _____ 25-50 _____ 50-150 _____ 150-300 _____ >300 _____

List 3 significant industry trends affecting this industry sector.

1. _____
2. _____
3. _____

Business owners' business strategy and business plan:

Business opportunities they are pursuing:

Business challenges they foresee:

Trends impact on KPI:

What problem do you solve?

Value added follow up: