Client knowledge framework

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A simple, but effective, framework which helps professionals working without a CRM system to capture key client information, identify knowledge gaps and think about client service opportunities. Also helps those with a CRM process to plan forward and focus on creating mutual value.

CORPORATE client

Client name	**Turnover and profitability (last 3 years)**
Length and nature of relationship **What services do we provide?**	**Sector / Industry** **Business Life Cycle phase** **(Launch / Growth / Maturity / Decline)**
Key people in the business	
About the key people (interests / family / values / what is important / key dates)	
Relevant background to the client (what they do / how long established / their story etc)	

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Their strategy / ambitions / where do they want to go?

Their key challenges: (Strategic, Marketing and Sales, People, Finance, Processes and Systems, External)

Potential opportunities to help solve their challenges and ease their pain

Questions that we need to ask

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PRIVATE / PERSONAL client

Client name	Length and nature of relationship
Background to the client / client circumstances	**Any business interests** **If so - other key stakeholders:**
Estimated wealth / total assets	**Primary focus area on the wealth life cycle** (Wealth: accumulation, preservation, transfer)
Client's key ambitions, goals and challenges	

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Services we currently provide
Possible other areas we could help
Questions that we need to ask