



Common Checklist Planning Items

- ✓ ENTITY FORMATION
- ✓ FINANCIAL
- ✓ BRAND & DIGITAL DESIGN
- ✓ BUSINESS PLAN
- ✓ MARKETING
- ✓ COMPLIANCE
- ✓ OPERATION
- ✓ HIRING
- ✓ OTHER

Name, Entity Selection & Formation, Office Planning, Phone & Communications Plan

Accountant & Tax Planning, Bookkeeping, Banking & Finance

Graphic Design, Website, Social Media

DO THIS FIRST!

Contact Management, Timing & Routine

Calendar, Continuing Education, Licenses, Insurance

Billing Systems and Policies, Conflict Check, IT Planning & Data Security

Plan, Costs, Counsel, Compliance

Emergency Planning, Retirement Planning, Succession & Closing Planning, Trust & Estate Planning



How much do I enjoy doing the type of work this client has to offer?



How much stress is associated with this work? (5 = low/no stress)



How much work does this client have?



How “warm” is this potential contact?



Would work with this client enable further growth?



Does the client pay on time?

SCORING KEY (1-5 with 5 being the best)



POTENTIAL CLIENT	Question 1 (ENJOY)	Question 2 (STRESS)	Question 3 (VOLUME)	Question 4 (RELATIONSHIP)	Question 5 (GROWTH)	Question 6 (PAYMENT)	TOTAL
CLIENT A	5	1	5	5	5	5	26
CLIENT B	4	2	5	3	3	5	22
CLIENT C	2	3	5	2	3	4	19
CLIENT D	1	2	5	2	3	4	17
CLIENT E	2	1	4	3	2	5	17
CLIENT F	2	1	4	2	1	0	10
CLIENT G	4	0	5	4	5	0	18