

Conversations Made Easy

Before you go

Expectations

Unique Connections

Set An Agenda

Explore Their World

Find: Time/\$/Resources

Understand Who Cares

Let Them Know You

How Big is the Problem?

Hours

Emotions

Adversity

Relationships

Dollars

Client Retention Matrix

1. Go Live & Special Teams
2. New Client on Boarding
3. Customer Org Chart
4. Quarterly Business Review
5. Update Customer Goals
6. Clear Hand Offs
7. Define Top 5 Client Qualities
8. Who is the CXO?
9. Contract Renewal Process
10. Referrals to your Customers

Goals

Business

Personal

Roles:

1.

2.

KPI's:

3.

Results:

4.

5.

Next Steps

Onboarding

What Else Can We Do/Referrals

Best 5 Questions To Ask

1.

2.

3.

4.

5.

What's Your Story?

Personal

1.

2.

3.

Business

1.

2.

3.

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