

Questions to Ask Yourself Before Meeting with a COI

- » How can I help them?
- » Why do I care about them?
- » What professional contact could I connect them with that would be good for them?

Possible Questions to Ask When You Meet with a COI

- » What problems do you see your clients facing currently?
- » Can you give me any other client examples with that kind of problem? (Look for a pattern)
- » Any other clients with other major pain points right now?
- » What other professionals do your clients work with?
- » Which of these professionals are most effective with your clients? Why?
- » Which of these other advisors are least effective? Why?
- » For the most effective, what are your thoughts on them?
- » For the least effective, what are your thoughts on them?
- » What reasons do your clients typically give for working with that advisor?
- » What results do your clients say they've achieved by working with that advisor?
- » Where do the clients think they've fallen short with the advisor?
- » What do you like about the advisor's offering or practice that you think they should keep doing?
- » What do you dislike and think they should stop doing?

Follow-ups

Helpful articles:

Potential client introductions:

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