SmartPath

Premium Fee Quadrant©

Details:	Progress:
Alignment:	**Impact:**

Premium Discovery Worksheet

Client Details & Discovery

Tax Advisor ______________________________

Client Profile

Client Name
Business Name

NOTES

(Industry, Gross Revenue/Income, Entity Structure, # of Employees, Accounting/Payroll software, Legacy goals for the business, etc.)

Discovery Meeting Template

1. **No matter what happens over the next 12 months, what do you want help accomplishing the next year?**

2. **How will accomplishing those things make your life and/or business better? What will the tangible impact be?**

3. **Other clients who have wanted to accomplish [X] have also wrestled with [give examples]. Has that been an issue for you? Or would you like to solve that as well?**

4. **I know all of these items are important and interrelated, what would you say stands out as your:**

1st Priority?	
2nd Priority?	
3rd Priority?	

5. **Is there anythine else we haven't addressed yet that's on your mind?**

6. **Do you feel you the client is aligned? (personally + results)**

YES ☑ **NO** ☐

If "No" - end meeting and refer to someone else or let them know you don't think it's a fit.

If "YES" - move to next step

7. **Thank you for meeting today, here are the next steps:**

- We'll put together a roadmap document that details how we can best help with the results we discussed today including pricing.
- We'll schedule one more quick call together to review the roadmap, answer any questions, and modify the roadmap if necessary.
- Once everything makes sense and is agreed upon, we can allocate resources for your work and get started.

8. ☐ **Schedule date & time for Roadmap Review meeting**