



## POTENTIAL CLIENT APPLICATION FORM

### WHY WE ASK YOU TO FILL THIS FORM OUT:

This application form will allow us to ensure that we can be a good fit for what you seek, this will be reviewed together.

We know we can't help every client, and this system is for helping to determine if we align. We want to quickly determine if we are the right partner to help you.

1. What do you feel is stopping you from progressing forward?
2. Tell us a bit about your holistic organization – what do you see as the main issues, and why do you feel it is stopping your growth.
3. What are some major concerns that you have?
4. What values and beliefs do you feel define your business?
5. What are your individual goals for quarter/year?
6. What major sales challenges are you hitting?
7. Who are your biggest competitors that you watch closely?