## STRATEGY 9: FORM PROFITABLE STRATEGIC PARTNERSHIPS

## COI Assessment Interview Guide

### Attributes

* Tell me about your practice.
* What services do you specialize in?
* What is the most difficult thing about making your practice much more successful?
* Where do your practice see in a few years?

### Contacts

* How many clients are you currently working with who have businesses valued at $10 million or more?
* What are you doing for these clients?
* Is there a particular type of client, such as business owners, corporate executives or celebrities, that make up most of your wealthy clientele?
* How do you generally meet wealthy prospects?
* Are you working with any other professionals who send you a steady stream of new wealthy clients?

### Resources

* How would you distribute the thought leadership content I’d provide to you?
* How much money do you have for workshops and other types of educational events?
* If we wanted to run educational lunches for clients and prospects, what kinds of rooms are available at your firm?
* What kinds of material are you sending out today?
* Do you send out material consistently or once in a while?

### Intent

* Do you want to make a lot more money?
* How would becoming much wealthier impact your family?
* How useful would it be for you to be recognized as one of the foremost authorities in your field?
* Where would you like your practice to be five years from now?
* What are the biggest obstacles to making your practice more successful?
* Besides greater business success and more money, what is really important to you?

### Critical concerns

* Is there anything that will stop or slow us down from working together?