

Uncovering Your Client's Fundamental Needs

HOW TO USE THIS WORKSHEET

This worksheet will serve you best if you use it regularly and proactively. If it's your first time filling it out, fill it out for past clients. But moving forward, I encourage you to fill it out in the time between a prospective client reaching out to you by email and you jumping on the phone with them. It'll help guide your interview questions, and it pairs really well with our Socratic Questioning Worksheet.

1. What did this prospective client come to you asking for, specifically?

2. What were their **stated reasons** for why they wanted that thing?

3. What clues did they give you about what their **fundamental needs** were?

4. What "theories" do you have about what their fundamental needs were, based on the clues from question 3? Rate your confidence in each theory on a 1-10 scale. With each, try to drill as deep as you can to get to the **really fundamental** needs.

5. What questions could you ask the client to more directly / concretely find out their fundamental needs?

6. Do you have any ideas for things they didn't ask for that you could do to best serve their fundamental motivations?

7. If you were to carry out the ideas from question 6, what ideas do you have for how could you track their performance in a **quantitative way** to illustrate, in hard numbers, how they served the client's fundamental needs? If you can think of the metrics, but you're not sure how to technically gather them, what education or resources would you need to marshal in order to find out?