

Bring your own client worksheet

During the *Succeeding as a Business Advisor* course, you are working with the client UltraSys. Later in the course, you will have the opportunity to apply the business advisor skills to understand more about your own client.

For this activity, think of a specific individual at a client company you are either working with or wish to work with. What are the company's issues and priorities? How can you establish or further develop your relationship with this individual? What questions would you ask?

Please take the time assigned to complete the information below. Write legibly so others will be able to read your input. When requested, please return this worksheet to your facilitator.

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|---|-------------|
| Partner for L05 activity | Leave blank |
| Your name | |
| Your TAS sub-service line | |
| Your Social Style | |
| Your client company name and sector | |
| Client company familiarity with EY (High/Medium/Low/None) | |
| Issues, strategic objectives and priorities for this company | |
| Your client contact's name and title | |