

★ *Original* ★

THE ESSENTIAL

CLIENT RECORD
FORM

by
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The Essential Client Record Form

Client Name:

Organisation:

Meeting date:

3 key things to remember about the client and first impressions:

Rapport 'facts'

Notes about the client's personality (MBTI, Disc, Metaprograms)

Office and Environment information

Other significant names and people (Assistant, Boss, Spouse, Children)

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