

Your Pre-Call Worksheet

I look forward to our discussion on Zoom in the next few days. To help us maximize our time together, please fill this out before our call. We will use it to draft a custom plan just for you!

Who is your dream enterprise client or partner — and why them?

(Think of a company, association, or org. that would transform your business if they worked with you.)

What specific problem or result makes YOUR business valuable to them?

(Be clear — what would they gain from working with you?)

How are you currently positioned or perceived in your market?

(Describe how people see you today vs. how you want to be seen.)

What's been your biggest barrier to landing enterprise-level clients so far?

(Examples: access, credibility, messaging, offer structure, etc.)

Fast Forward 12 months. You've landed 1-5 Enterprise clients. How has your life changed?

(Examples: Increased profitability by ___, Less headaches w/small clients, more time w/family.)
