New Client Acceptance Form

spotlight reporting

Business Name: ____

Date of meeting: _______________ **Meeting host:** ____________________

Attendees: ____

		Yes	No
1	Growth potential – does the business have the ability and potential to grow?		
2	Relevance - is the business and/or industry of interest or relevance to our firm?		
3	Fees – are the owners/decision-makers fee averse? Do they understand value-pricing and see our services as an investment?		
4	Breadth – is the business likely to be able to scale their investment with us? Do they need (either now or potentially later) a trusted advisor matrix of services?		
5	Scope – have we identified the services we want to deploy and when? Has the team discussed these and a simple outline plan to deploy?		
6	Cloud – is the business cloud-enabled and achieving efficiencies, or prepared to?		
7	Ethics – have we done our due diligence?		
8	Legal – are there any legal or profession concerns?		
9	Terms – is an engagement letter signed and have the terms been discussed and understood?		
10	Sanity Check – is this a ‘good fit’? Are we sure?		