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**SN Template: Strategy Session Meeting Prompts- Systems Vault**

**Client Strategy Session Prompts are split into 3 categories:**

**GOALS** – What does the client/business want?

**PLANNING** – What do YOU need to do to support those goals?

**GATHERING** – What do YOU need to know about the business

**GOALS**

1. **What goals do you have for your business?**

What do you want to accomplish within the next 3 months (and overall in the year- roughly, big picture)?

(This can include revenue goals, list building goals or launch/promotion goals)

1. **What strategies or plans do you have in place already to meet these goals?**

Ask about marketing, launches and other activities they are currently working on or considering so you can start to plan to support them.

1. **What do you consider to be the top 3 to 5 priorities in the next 90 days?**

This will lend itself to creating clear measures of success for this timeframe.

1. **What do you want to see come off your plate immediately? Within 30 days? Within 90 days?**

Get clear on what needs to come off your client’s plate.

**PLANNING**

Now that you know the goals you can start to work on breaking it down into priorities & steps.

1. **Identify Your Top 3-5 Project Priorities for the Next 90 days**

Based on the answers above – what projects do you need to focus on for the next 90 days?

1. **Identify Top Priority Action Steps for Each Project**
2. **Identify Your Top 3-5 Marketing Activities for the Next 90 days**
3. **Identify Top Action Steps for Each Marketing Activity**

Identify any obstacles that could possibly get in your way? These could be about the current status of the business, client challenges, team, your own concerns, etc.

**GATHERING**

**You need to gather key information about the business. TIP: Be sure to centralize this information in the Project Management Tool as you gather it (or make note to add it once the virtual office is setup!)**

1. **What CURRENT revenue streams are in place? (sales funnel)**

Include details such as pricing, availability, webpages and other materials/resources. Services Products

1. **What WEBSITES are in place?**

Get to know all the websites that your client has including main/home website, blog sites, sales pages and squeeze pages.

1. **Who is currently on the TEAM?**

Make note of all ongoing/dedicated people (virtual assistants and such) as well as any project based people. Briefly outline what each person is responsible for.

1. **What TOOLS is your client using?**

Gather list of all software tools including logins.

1. **What SYSTEMS are in place?**

Is there a centralized cloud for saving all company files, SOPs, etc.?

Is there a Project Management Tool in place?