

Episode 7 - Worksheet



CRAFTING THE CLIENT PROFILE : NEGOTIABLES VS. NON-NEGOTIABLES

Date :

Negotiables and non-negotiables are crucial aspects to consider when establishing a business relationship.

Negotiables are elements of a deal or relationship that can be adjusted or modified through discussion and compromise. These can include factors like pricing, contract terms, or service offerings. On the other hand, non-negotiables are core principles or values that cannot be compromised under any circumstances, such as integrity, legal compliance, or safety standards.

Defining them upfront ensures clarity, guides negotiations, and underscores a commitment to ethical business practices.

Use the below exercise to figure out what values and terms you can compromise on and what you can't.

PERSONAL ASSESSMENT

1. Hours: Are you willing to work with customers that require additional time commitments? (After hours, business trips, evenings and weekends?)

Strongly Disagree

Neutral

Strongly Agree

2. Time Allotment: Are you committed to dedicating specific time blocks to prospecting, managing active customers etc. to create the best opportunities for you in the future?

Strongly Disagree

Neutral

Strongly Agree

3. Workplace: Does my office environment have the tools needed for you to conduct business free of distractions? Can you conduct calls, send emails, and be in the right mind space in your place of work?

Strongly Disagree

Neutral

Strongly Agree

4. Work/Life Balance: Is it important for you to delegate time to both work and personal time such as family, friends, and personal health.

Strongly Disagree

Neutral

Strongly Agree

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5. Quality of Service: Is maintaining the quality of service a priority for you, reflecting your brand and reputation?

Strongly Disagree

Neutral

Strongly Agree

6. Margin Per Shipment/Commission - What is the minimum margin I need to make to ensure I am compensated for my time as well as so I can deliver the best possible service to my customer.

\$ _____

BUSINESS RELATIONSHIP ASSESSMENT

1. Core Values: Does your prospects values of honesty, respect, transparency, etc. need to match your own?

Strongly Disagree

Neutral

Strongly Agree

2. Fair treatment: Is it essential to you that clients treat their employees, suppliers, and partners fairly and equitably, without discrimination or exploitation?

Strongly Disagree

Neutral

Strongly Agree

3. Communication: Do you seek clients who maintain open and clear communication channels, addressing inquiries and concerns promptly?

Strongly Disagree

Neutral

Strongly Agree

4. Location: What areas do you prefer to work in, and are you open to negotiation based on logistical feasibility and price?

Strongly Disagree

Neutral

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5. Customer Acquisition/Maintenance Costs: - What is a customer worth to you? Are you flexible on how much you want to spend to acquire and/or maintain a customer?

Strongly Disagree

Neutral

Strongly Agree

6. Company Size/Revenue: Are you open to working with businesses of various sizes, with negotiation possible based on the scope and scale of the partnership?

Strongly Disagree

Neutral

Strongly Agree

7. Service requirements: Do you consider negotiating service requirements based on capacity, capability, and willingness to pay?

Strongly Disagree

Neutral

Strongly Agree

8. Contract terms: Are you open to negotiating contract terms, including duration, renewal options, and termination clauses, based on mutual agreement?

Strongly Disagree

Neutral

Strongly Agree

9. Safety & Compliance: Do you seek clients who prioritize safety in all aspects of their operations and comply with relevant laws, regulations, and industry standards?

Strongly Disagree

Neutral

Strongly Agree

10. Pricing: Will you consider negotiating pricing based on factors such as volume, frequency, and long-term commitment?

Strongly Disagree

Neutral

Strongly Agree

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11. Payment Terms: Are you open to discussing alternative payment arrangements based on your preferences and financial capabilities?

Strongly Disagree

Neutral

Strongly Agree

12. Additional support: If a client requires additional support or resources from you, such as a dedicated account management or training services, are these something you would be willing to negotiate based on their needs?

Strongly Disagree

Neutral

Strongly Agree

SUMMARY

1. Now that you've set out expectations on your own personal and relationship negotiables and non-negotiables, provide a summary of what you've learned about yourself and what you are looking for in your ideal client.

2. Now that you have an idea on what your "Ideal Client" looks like, do you think you are capable of stepping up to match the requirements of servicing such clients and the expectations that you've set out for them?

YES

NO

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3. Write a commitment statement for yourself:

Having clearly defined expectations and values for yourself and your customer are essential for building strong and lasting partnerships that are mutually beneficial.

"You can't expect the best if you're not willing to become the best!" - Daman Grewal