

Crucial client conversations worksheet

Crucial client conversations worksheet

Acknowledge Listen, empathize, connect	Perspective Share and educate
Confidence Prioritize client goals	Opportunity Give action steps

Capital Client Group, Inc.
All Capital Group trademarks mentioned are owned by The Capital Group Companies, Inc., an affiliated company or fund. All other company and product names mentioned are the property of their respective companies.
This content, developed by Capital Group, is for informational purposes only and should not be used as a primary basis for investment decisions and is not intended to serve as impartial investment or fiduciary advice.
See how: [https://www.capgroup.com/insights/essential-questions-for-advisors](#) © 2020 Capital Group. All rights reserved.



Why this worksheet exists

- Created in response to the 2007-2008 global financial crisis to provide structure around meaningful conversations
- Reflects feedback from sales and other professionals on what drives better engagement and outcomes
- Designed to help advisors connect conversations to planning actions and practice growth

When to use this worksheet



Group meetings

For coaching or sharing best practices



1:1 meetings

To spark discussion and reflection



Workshops or training events

Reinforce the value of productive and challenging conversations with clients

How to use this worksheet effectively

1. Introduce the origin – share why this matters and how it came to be
2. Walk through the worksheet – preview the fillable sections and give examples:
 - **Acknowledge** – Listen, empathize and connect
 - **Perspective** – Share and educate with non-firm-specific information
 - **Confidence** – Prioritize client goals, present a clear path forward, and support it with a proof statement
 - **Opportunity** – Give action steps
3. Put it into practice

Tip: Encourage users to revisit the worksheet after a client meeting to add new insights

Crucial client conversations worksheet

<div>Acknowledge Listen, empathize, connect</div>	<div>Perspective Share and educate</div>
<div>Confidence Prioritize client goals</div>	<div>Opportunity Give action steps</div>