

# Client Needs Assessment



## Who

Get to know who your client is, what they stand for, what they're aiming for, and where they're coming from.



- Legal/Tax entity type
- Accounting year end
- Business history
- Business profile
- Unique industry
- Solopreneur status
- Growing enterprise
- Mission, vision, values
- Business goals

## What

Every business, large or small, has a variety of parts. You need to find out what they are in order to best discuss QuickBooks functionality and benefits with them.



- Reporting requirements
- Daily operations
- Sales/Customer workflows
- Expense/Vendor workflows
- Administrative tasks
- Accounting software & processes
- Technology stack & processes

## When

How often do they run reports? What are their deadlines? All of your clients will have tax return requirements for their business and personal banking even if they don't run payroll or compliance, or collect sales tax.



- Compliance & filing deadlines
- Income tax needs (personal & business)
- Estimated tax needs (personal & business)
- Payroll/payroll tax
- State tax requirements
- Industry-related compliance requirements

## How

How can you help? You can delve deeper using the client checklist, follow the onboarding process, and begin to plan deliverables and tasks with your client.



- Run a discovery session using the client checklist
- Follow an onboarding process
- Plan 15-, 30-, 60-, and 90-day deliverables
- Design workflows that fit operations & tech stacks built for collaboration
- Delegate based on strengths
- Assign & take action