

Atomic Agents: Incubator | Define Your Client

The better we understand people, the better we serve them.

Every Business Serves Someone

Think about someone you've genuinely enjoyed serving.

What made that relationship memorable?

Every successful business improves someone's life by...



Head

What Are They Thinking?

What questions do your clients ask most often?

What questions do they rarely ask, but probably should?

What question could you ask to better understand what's on their mind?



Heart

What Are They Feeling?

What emotions might your clients experience before they ever meet with you?

☐ Excitement

☐ Fear

☐ Hope

☐ Uncertainty

☐ Stress

☐ Overwhelm

☐ Confusion

☐ Relief

☐ Other _____

How can you help reduce uncertainty?

What helps people feel respected and cared for?



Eyes

What Are They Seeing?

Where are your clients getting information?

☐ Friends & Family ☐ Social Media ☐ News ☐ Google ☐ Reviews

☐ Other Professionals ☐ Personal Experience ☐ Other _____

What are they really looking for?

☐ Confidence ☐ Clarity ☐ Direction ☐ Peace of Mind ☐ Opportunity

☐ Belonging ☐ Security ☐ Other _____

How can you become a source of clarity?

Ears

Who Are They Listening To?

Who influences your clients' decisions?

How can you become one of the trusted voices?

What helps people feel heard?

Hands

What Are They Trying to Accomplish?

The request:

The purpose behind the request:

One additional question I could ask:

Feet

Where Are They Going?

What future are they hoping to create?

How does today's decision move them toward that future?

Backpack

What Are They Carrying?

What experiences might your clients bring into your first meeting?

- ☐ Previous bad experience
- ☐ Financial stress
- ☐ Fear of making a mistake
- ☐ Lack of knowledge
- ☐ Family pressure
- ☐ Time constraints
- ☐ Other _____

How can empathy change the conversation?

Voice

What Aren't They Saying?

What concerns do people often hesitate to share?

How can you create a safer place for honest conversations?

Seeing the Whole Person

Which of these areas do you naturally notice?

★ Circle your strengths.

 Head _____

 Heart _____

 Eyes _____

 Ears _____

 Hands _____

 Feet _____

 Backpack _____

 Voice _____

Which area would you like to become more intentional about?

Builder's Checklist

- ☐ Observe before advising.
- ☐ Ask one additional question.
- ☐ Listen without interrupting.
- ☐ Look beyond the transaction.
- ☐ See the whole person.

Atomic Reflections

Week 3

Monday

What did I learn about someone today that I wouldn't have known if I hadn't asked another question?

Tuesday

Did I spend more time listening or talking?

Wednesday

What assumptions did I make today, and were they accurate?

Thursday

How did I help someone feel understood?

Friday

Which "body part" did I notice most this week and which one do I want to improve next week?