Client Analysis Checklist

Use this as a sanity-check on your understanding of a client before outreach or meetings.

Customer Context

- Do I understand what this customer does day to day, and how they generate revenue?
- Can I explain their operating environment?
- Do I understand what success looks like for them?

Customer Situation (What's happening now)

- Has something recently changed for this customer?
- Are they reacting to an internal/external issue, or proactively improving?
- What would staying the same (not improving) cost them over time?

Stakeholders

- Do I know who on the client side cares about this problem?
- Do I understand the customer's decision making process?
- Do I know who could quietly block this decision?

Pain and Pressure

- Are the pain points specific and observable?
- Do I understand the business impact of these pains?
- Can I clearly (and ideally with hard evidence) explain to the customer what happens if they do nothing about the pain points?
- Have I analysed the pain points for Each Stakeholder involved?

Urgency and Timing

- Why does the solution you are proposing matter now?
- Are there deadlines, triggers, or external pressures involved?
- What is the impact on the business if this decision to proceed is delayed by 3-6 months?

Use Cases

- Do I have clear use cases tied to real situations/pain points?
- Are the use cases measurable or credible?
- Can I explain why these use cases matter to this customer/stakeholder, from their perspective?

Value Articulation

- Can I explain the value of our solution without the use of features or marketing buzzwords?
- Does the value align with the customer's priorities?
- Would this sound credible to a CFO or senior operator/manager?

Decision Friction

- What could slow this decision down even if value is clear?
- Who benefits from not changing anything (blockers)?
- What additional effort, disruption, or risk does this change introduce?

Proof and Credibility

- What kind of proof would this customer and stakeholder find credible?
- Is anecdotal proof enough, or are metrics required?
- Would peer references matter more than case studies?

Risk and Rejection

- What objections or concerns are likely, and why?
- What information would I expect them to ask for?
- What can I do to prevent this from happening (pre-mortem rejection)?

Conversation Readiness

- Do I know what I want to learn in the next conversation?
- Do I know what not to pitch yet?
- Am I prepared to listen more than I talk?
- Have I practiced the conversation prior to reaching out to the client?