🗹 REALITY CHECK

Name: Click and type

Date: Click and type

Once you’ve completed this strategy, please submit your completed Reality Check as follows:

* + - Complete this document with your answers.
    - Save a copy of your completed *Reality Check* and email it as an attachment.

Know Your Client with FORM

1. What does FORM stand for? Click and type
2. On which clients do we proactively collect FORM? Click and type
3. How can you use FORM to enhance trust and rapport with your top clients? Click and type
4. Provide an example of how you have used FORM in a meaningful way with a client? Click and type
5. Where will you be storing the FORM information? Click and type