

# Capabilities Briefing Check List

## When clients hire you *specifically* “Clients call on us (xyz company) when...”

- 5 Times Clients Call on us
- Specific examples of successful client engagements (case studies) – OR – successful projects you *led* as an employee, independent contractor or business owner, “When \_\_\_ and \_\_\_.”

## Why there is a good fit / good alignment /good synergy between you and them (3-4 bullets)

- Overview of relevant experience – what will show why you understand their challenges?
- Brands you’ve worked with
- Years of experience
- Books you’ve authored
- Talks you’ve delivered

## Areas of core expertise (your areas of expertise)

- Ways that you deliver your services
- Coaching
- Consulting
- Program management
- Done-for-them services
- Regulatory and compliance
- Etc.

## Geographic-specific expertise

- Industry-specific expertise
- Profession-specific expertise
- Other domain-specific expertise

## What it *might* look like to work together

### “Why us”

### Leadership team

### Your “bench” (if relevant)

## Third party statistics capturing trends, ROI, impact, costs, etc.

- Media quotes or SME quotes on trends, impact, ROI, emerging, KPI’s, challenges, etc.
- Before and after photos
- Photos of you or your team in action
- A list of result propositions
- An infographic of your key metrics
- A list of credentials, certifications, etc.
- A visual (chart, graphic, flowchart) of your proprietary
- methodology, process or system (or keep your secret sauce and seed the magic here)

## A list of reasons why your clients love you

## A comparison of your approach versus the “typical” approach