

Private Client Accountability Sheet

1. **Sound Strategy** - What strategy did we design and deploy that is working right now
2. **Knowledge Transfer** - What body of knowledge did we pass on to our client
3. **Ongoing Guidance/Course Correction** - What decisions did we impact & how
4. **Deal Making** - What deals did we facilitate, accelerate, optimize or maximize
5. **Relationships** - What relationships (JV, customers, vendors) did we facilitate
6. **Direct Delivery** - How did we roll up our sleeves to get important things done
7. **Staff Development** - How did we improved staff morale, performance or acumen
8. **New Revenues** - How did we impact new business
9. **Profitability** - Did we help reduce expenses that do not contribute to the bottom line
10. **Overall Mission** - Is our client, the CEO, in a better place than before they met us