

# RELATIONSHIP MANAGER TRIGGER CHECKLIST

## 6 Key Triggers to Listen Out for in Customer Conversations



### Stalled Growth Or Profit Pressure

#### Listen out for:

- "Margins are tightening"
- "Revenue is flat, we need growth"
- "We're busy but not making money"

#### Open questions to ask:

- "What is currently limiting growth?"
- "How have margins changed over the last 12 months?"



### Leadership Overload Or Fatigue

#### Listen out for:

- "Everything comes through me"
- "There's never enough time"
- "I'm constantly firefighting"

#### Open questions to ask:

- "Where do you spend most of your time?"
- "What would happen if you stepped away for two months?"



### People Issues Or team Friction

#### Listen out for:

- "Staff turnover is frustrating"
- "Performance is inconsistent"
- "The team isn't aligned"

#### Open questions to ask:

- "What people challenges concern you most?"
- "How confident are you in your management team?"



### Funding Conversations

#### Listen out for:

- "We're investing but returns are unclear"
- "We need funding to grow"
- "Cash is tight"

#### Open questions to ask:

- "What is currently limiting growth?"
- "How have margins changed over the last 12 months?"



### Change Or Transition Moments

#### Listen out for:

- "We're expanding or restructuring"
- "We've just hired senior roles"
- "I am planning how to exit"

#### Open questions to ask:

- "What changes are coming over the next 12-24 months?"
- "What risks concern you most?"



### Lack Of Clear Direction Or Strategy

#### Listen out for:

- "We need to refocus"
- "We're trying a few things"
- "We've got too many opportunities"

#### Open questions to ask:

- "What are the top three priorities?"
- "How clear is the plan for the next 12 months?"
- "What is keeping you awake at night?"

### Your Opportunity to Add Value

- Introduce a free, no-obligation Strategic Review
- Help the customer step back and gain clarity
- Identify growth opportunities, constraints and risks
- Strengthen performance, leadership and long-term value



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