



CAPTAIN HOOK FORM



We know that the more “hooks” and relationships we have with a given client, the more opportunity we have to grow our relationship and also recover from potential issues. The point of this form, is to assure that each of our clients have meaningful relationships with a larger group of people than prior to using this form.

Fill out the form below and email it to the staff member(s) that you'd like to connect with your client/prospect. Make sure the form is completed with as much detail as possible.

CLIENT INFORMATION

REQUESTED BY:

SALES REP./ACCOUNT EXECUTIVE:

WHICH OFFICE:

CLIENT COMPANY:

COMPANY ADDRESS:

OFFICE PHONE:

:MOBILE PHONE:

EMAIL:

THE WHY

Please give a brief background of how this person became a client or prospect. Is there anything specific we should know? Using this form, what are you hoping to accomplish? Are there any specific transactions, situations or relationships that are relevant?

WHO SHOULD CONTACT THE CLIENT	EMAIL	CALL	NOTE	MEETING	INITIALS OF COMPLETION
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

FEEDBACK/NOTES

