



CLIENT OPERATIONS

Client health review worksheet

A quarterly client review for spotting delivery risks, renewal opportunities, and relationship gaps before they become surprises.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

You need an honest view of an active client relationship.

WORK THROUGH THE CHECKLIST☐ **01 Review goals and value delivered**

☐ **02 Check open risks**

☐ **03 Review scope and margin**

☐ **04 Assess engagement and responsiveness**

☐ **05 Identify next opportunity**

☐ **06 Agree the relationship plan**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.