

Selling Essentials: Developing Clients for Life

PREVIEW



HRDQ.[®]

Course Objectives

Upon completion of this course, you will be able to:

- Explain the process of product implementation and plan how to develop clients for life
- Describe how to develop strong, mutually beneficial client relationships
- Discuss effective techniques for building customer relationships
- Identify strategies for capitalizing on customer relationships

Activity

Instructions: Reflect on your experiences and skills. Be honest with yourself as you assess your skills. Read each of the following and write the number that applies:

1–Never 2–Rarely 3–Sometimes 4–Often 5–Always

| Implementation | Rating |
|---|--------|
| I stay in touch with my customer after the sale is made. | |
| I ensure that the product is delivered or implemented to the customer's satisfaction. | |
| I have a plan in place to handle potential problems or complaints. | |

Activity (cont.)

Instructions: Reflect on your experiences and skills. Be honest with yourself as you assess your skills. Read each of the following and write the number that applies:

1–Never 2–Rarely 3–Sometimes 4–Often 5–Always

| Planning for Follow-Up | Rating |
|---|--------|
| I create a plan to follow up with my customer after the sale. | |
| I involve my customer in my follow-up plan. | |
| I ask my customer his preference for means of communication. | |
| I use creative strategies for communicating with my clients. | |

Keys to Developing Client Relationships

- Creativity – Offer innovative and valuable ideas.
- Sincerity – Be forthright and honest.
- Authenticity – Be genuine.
- Passion – Believe in what you are doing.
- Dedication – Be committed to your client's goals.

If you exhibit these qualities, the client will trust you. Together, you will build a strong relationship.

“The toughest thing about the power of trust is that it's very difficult to build and very easy to destroy.”

*—Thomas J. Watson
Founder, IBM*

Benefits of Business Relationships

If you create good, healthy relationships with customers, they will even forgive your mistakes (as long as mistakes aren't the norm).

Relationships are essential to the success of business. Work closely with your customers and develop relationships with them. When they are on your side, your work will be more enjoyable and you will have more productive results.



Basics of Good Client Relationships

Tips for building client relationships:

- Keep customers informed of what's going on (new products, competitive issues, account information, orders, and so on).
- Find out what issues are important to your customers.
- Don't assume you know what customers want without checking it out.
- Stay in touch, add value, and provide ideas, best practices, and resources to help your customers.
- If you make a mistake, be honest and admit it.
- Be reliable. Follow up and do what you say you are going to do.

“If there’s one reason we have done better than our peers, it is because we have focused like a laser on customer experience, and that really does matter, I think, in any business.”

*—Jeff Bezos
President , Amazon.com*

Developing Clients for Life

Building Good Client Relationships Practice

Read each statement and decide if it is True or False. Click on the statement to reveal the answer.

| | |
|---|-------|
| <u>How much customers pay for your product or service is the most important factor in developing a customer for life.</u> | False |
| <u>It's better to admit making a mistake than to try to cover it up.</u> | True |
| <u>Try to read your customers' minds and guess what they need before they tell you.</u> | False |



Implementation

Many sales reps disappear after the sale is made and the product is delivered to the customer. They mistakenly think that their work is done, but their job of building the relationship has just begun.

Sales reps should make a point to stay in the loop with the internal team that handles the implementation or delivery of the product. They should find out what went well and what could have gone better in those processes.



Implementation (cont.)

Devise a personalized implementation plan and share it with your customer prior to the implementation of the product or service.

Let your customer know that you are confident that the implementation will run smoothly. Make it clear, however, that if anything does not meet his expectations, you want to know about it. Let him know that you will follow up during the implementation to ensure his satisfaction. Additionally, plan to stay in touch to ensure continuing satisfaction and value for the customer. Make a plan with him on the best channels for communication.

Let him know you and your company are experts at:

- Handling complaints
- Providing customer satisfaction
- Planning for follow-up
- Communicating with customers

“It takes as much energy to wish as it does to plan.”

—Eleanor Roosevelt

Levels of Client Relationships

As you follow up with your clients and ensure they are satisfied, your relationships will grow.

The progression through each level isn't always quick and easy. Relationship development takes time and not every relationship will develop into a trusted advisor relationship. Let's look at the different relationship levels:

| Level | What a Client Might Say About You |
|------------------------|---|
| Acquaintance | We've met them once or twice. |
| Associate | We know them and have common acquaintances. |
| Vendor | They have done a few transactions with us. |
| Trusted Vendor | They are good at what they do and we use them regularly. |
| Trusted Advisor | They are a long-term partner and trusted advisor. They put our needs first and add great value. |

Strategies

Here are some strategies for understanding and meeting your clients' needs *and* providing value:

- Use your creativity and expertise to find a reason to stay in contact with your customer. (Be sure to offer some value—don't just check in to say hello.)
- Continue to read about the industry and competitive trends.
- Research and examine every part of the client's organization. Set up internet search alerts for the company name, executives, and related agencies to ensure that you stay on top of industry news. Know what remains important to them.



Strategies (cont.)

- Keep abreast of the customer's vision, who they are, and what they stand for. Reference this in conversations and communications when appropriate.
- Go above and beyond what the customer expects. Provide “the ultimate customer experience.”
- Spend time with customers in the workplace and informally (at dinner or sporting events, playing golf, and so on).



Application

Reflect on a client you have built a relationship with.

What are the client's priorities?

What are some specific ways you might add value?



Account Checklist

| Issue to Consider | Questions to Ask |
|--------------------------|---|
| Current Position | <input type="checkbox"/> What is my current position with this client? |
| Current Challenge | <input type="checkbox"/> What is the main challenge I face in developing and managing this relationship? |
| Client Priorities | <input type="checkbox"/> What are the customer's corporate priorities and goals? <input type="checkbox"/> Individual priorities? |
| Cycle of Success | <input type="checkbox"/> What are the upselling opportunities to grow this account? |
| Relationship Development | <input type="checkbox"/> What executive relationships should be developed to sell the opportunity noted above? |
| Necessary Resources | <input type="checkbox"/> What internal resources are needed to maximize this account? |
| Next Steps | <input type="checkbox"/> What needs to be done? By whom? When? <input type="checkbox"/> How we add value? |

Case Study

Read the following case study and answer the questions that follow in order to put your critical thinking skills into practice.

The sales rep: Katherine Sams, Sales Rep at Quality Tooling

The organization: Quality Tooling supplies manufacturing companies with a variety of products for manufacturing lines.

The situation: Katherine has worked for almost a year to close a significant deal with a new client, Magna Manufacturing. She is thrilled to have this account and especially happy for the opportunity to work with her new client, Bill Frida, the CFO.

The new product implementation went well, with the exception of a couple of minor problems. But now Katherine is having a difficult time reconnecting with Bill. She can't reach him by phone and her voicemails aren't returned. She has sent a few emails, and doesn't want to appear like she is hounding him.

Questions to Consider



- How can Katherine ensure that Bill is satisfied when she can't make contact with him?
- What can she do to build a relationship with her new client?
- How can she upsell new opportunities if she can't talk to him?

Reflect on these questions for a moment and then view the suggestions on the following slides.

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