

Every client meeting provides a dynamic new opportunity

Are you taking every advantage offered to you?

By *Bradford Agry*

With the current tight economy, companies must work harder to hang onto their existing clients. Although sales professionals know that it is much easier to sell to an existing customer than to land a new one, account managers too often fall into the habit of becoming order-takers.

Now, more than ever, you need to respond to the changing needs of your client's business or risk losing out to a competitor. However, successful client meetings require thoughtful planning to strengthen and expand these relationships.

"You should view every client meeting as an opportunity to ex-



Merna Skinner

pand your business," counsels **Merna Skinner**, a partner at **Exec|Comm**, a New York executive communications training company.

She adds, "Never assume that the state of your client's business or needs has remained the same between one meeting or phone call and the next."

Unfortunately, many account representatives do not pay enough attention to how they actually conduct business with their existing clients. After the initial period of getting to know each other, the emphasis often shifts to process — that is, completing projects and delivering promised goods or ser-

vices. By focusing primarily on process, many account representatives miss opportunities to cross-sell related services or identify new ways of fulfilling customer needs.

In some cases, account managers face the arrival of a new client contact who replaces a "known ally." Most times, your account associates conduct their first client meetings with an existing customer. Skinner summarizes the best approach: "Whether you are dealing with a new or known client contact, the skilled account advisor begins every meeting by briefly summarizing the client's needs as of the last meeting. The associate should then ask what, if anything, has changed since the previous meeting."

Below, Skinner offers a proven process that will ensure that you and your client have a mutually productive and rewarding meeting:

✓ **Summarize**

You should start the meeting with a two-sentence statement that succinctly summarizes your understanding of where the account currently stands. Many managers mistakenly assume nothing has changed since the previous meeting. Only when you get an initial agreement on "where things have been and where they are going" can the meeting proceed productively.

✓ **Listen and probe for changes**

If original priorities or assumptions have changed, ask several open-ended questions to clarify where things now stand. For example, you may discover that the new customer's poor results of an advertising campaign for your product may now mean your buyer no longer wants your order to ship as planned. You need to uncover the new working assumptions and probe for additional information to realign your approach.

✓ **State the approach**

Briefly explain how you would like to proceed with the meeting and confirm that your customer agrees. Be prepared to move items around and always seek commitment on project priorities. Flexibility in your approach is very important.

Keep your personal agenda simple. Many client service managers try to complete too much in one meeting. Respect time limits and don't hesitate to suggest future meeting dates for new items growing out of the original agenda. Choose another meeting time for these subjects that demand more lengthy discussions or the involvement of additional decision-makers.

✓ **Manage the information flow**

Know ahead of time how you want to present your information. If you will use written documents, concisely give your listeners an overview of the document to satisfy their curiosity and keep everyone, literally, on the same page. Then, clearly

lead your buyer through the pages in an orderly fashion that logically builds your case. Often clients may have read material ahead of the meeting and will arrive prepared with a number of questions. Respond

to these queries without letting your customer unreasonably sidetrack your agenda.

✓ **State the benefits**

Clients want to hear at this point specifically how your recommendation benefits them. They need to know how time, money and other intrinsic values will be improved by your proposed course of action.

✓ **State simple next steps**

Once you gain your client's buy-in, summarize who does what by what date. At this point in the meeting, you should discuss any resources that may be lacking or additional missing information that will impede keeping the project active. Put a due date on the delivery of these interim needs to make sure that the larger project stays on schedule. Send a written summary of the meeting within 24 hours to all meeting attendees to ensure that all parties agree on next steps.

Every client meeting offers a new, dynamic opportunity to strengthen your relationship and mutual understanding, to increase your knowledge of your client's business and needs and to better serve that client. When you follow the process described above, both you and your client gain. ■

'You should view every client meeting as an opportunity to expand your business.'

— Merna Skinner, partner at Exec|Comm