****
CLIENT LOYALTY: STRATEGIES FOR BUILDING INNER CIRCLE RELATIONSHIPS
Number 22
****

Client Loyalty is a free, monthly newsletter published by Andrew Sobel, the leading authority on the skills and strategies required to build broad-based, long-term relationships with clients and customers. It is based on Andrew's research, writing, and popular workshops on developing long-term client and customer relationships. http://www.andrewsobel.com

This month: How to Prepare for Any Client Meeting

==

If someone has forwarded this newsletter to you, please refer to the subscribe/unsubscribe instructions that are listed at the end of this issue to get your own subscription to *Client Loyalty*.

16 Tips to Help you Prepare for <u>Any</u> Client Meeting

A client meeting doesn't start when you walk in the door and say good morning to your client. Rather, it should begin a day or two earlier, as you mentally prepare and reflect on how to make that meeting a success for both of you. Too often we are preoccupied with a key message we're trying to deliver, a point of view we want to convince our client of, or an agenda that we're determined to get through at any cost. Such rigidity and lack of forethought can be disastrous. One client I know got a meeting, after waiting for months, with the CEO of a large Fortune-500 company. The senior executives representing this client were so focused on their own agenda that they missed valuable cues in the first five minutes of the meeting. They had failed to thoroughly research the CEO's agenda and history of public statements about the company's strategy. As a result, 25 minutes into a one-hour meeting, the CEO got up, told my client that the meeting was over, wished them luck, and left the room! Here are some suggestions for avoiding such an ignominious demise in any of your own client meetings:

1. Have you spent as much time thinking about what your *client* is going to say as you have thinking about what *you* are going to say? Have you considered the different ways your client may react to your message?
2. Have you put yourself in your client's shoes? What business or personal pressures is he/she feeling right now? How is his/her relationship with superiors, colleagues, and subordinates?
3. Have you made a list of what you don't know about this client but would like to know? If it's a first meeting, have you found out everything you can about the individuals you'll be meeting with? Can you use this meeting as an occasion to become more knowledgeable about your client?

4. Are you structuring the meeting to create a real dialogue with your client? This could mean having no written materials whatsoever—or, if you do, making sure you engage your client as you walk through the presentation, testing for understanding, agreement/disagreement, and corollary issues.
5. For this client, what are the rational, political, and emotional implications of the issue at hand? Of your message?
6. Your meeting has two objectives: to make progress against your client's business issue or need, and to develop/improve the relationship. How will you further both agendas?
7. Are you focused on activities or inputs—on reports, hours billed, analytical formulas, deliverables, and so on--or are you constantly keeping the client's objectives and the value he/she seeks at the forefront of your discussions?
8. Do you fully understand the perspectives of the various constituencies that surround your client? (e.g., senior management, subordinates, customers, capital markets, as well as different functions and organizational units?)
9. Will you present yourself and your views in a way that reinforces your standing as a deep generalist--someone with outstanding expertise but also possessing a broad, top-management perspective and an understanding of the entire business "ecosystem" that surrounds your client?
10. In your meeting, will you exhibit a mindset of "independent wealth"? (i.e., you are totally focused on your client's agenda, you demonstrate a love for your work, and you treat your client as an equal).
11. If you are going to meet your client with other team members, have you:
    a. Established clear roles for everyone during the meeting?
    b. Identified a colleague who will focus singularly on observing the meeting's interactions and taking detailed notes?
    c. Thought through whether the mix of individuals you are bringing to the meeting makes sense and will provide a diversity of styles and approaches?
12. Are you keeping in mind the behaviors that make us comfortable with any individual: praise, positive association, similarity, familiarity, openness, and rapport?
13. Are you prepared to exercise a "doubting mind"--are you ready to question both your client's assumptions and *your own* assumptions? To reserve judgment about outcomes until you see the whole picture?
14. Do you have an agenda and game plan for the meeting, and have you discussed this with your client ahead of time? Are you prepared to calmly abandon this agenda if your client wants to take the meeting in a different direction?
15. Have you met or spoken with at least some of the clients who will be at the meeting, and socialized the information or conclusions that you'll be discussing in order to get their reactions and comments ahead of time?

16. Whether this is the 10th or 100th meeting with this client, are you prepared to treat him/her like a brand new client? Are you bringing the same freshness, enthusiasm, and new ideas that you brought to the first or second meeting, when you were wooing this client?

===

Andrew Sobel is the leading authority on client relationships and the skills and strategies required to earn enduring client loyalty. A noted business strategist, he is the author of the bestsellers *Making Rain: The Secrets of Building Lifelong Client Loyalty* (John Wiley & Sons) and *Clients for Life: Evolving from an Expert for Hire to an Extraordinary Advisor* (Simon & Schuster/Fireside). He speaks frequently to corporate groups on building long-term client relationships. Andrew can be reached at andrew@andrewsobel.com (Tel: 505.982.0211). His website, http://www.andrewsobel.com, contains additional articles on client relationships as well as back issues of this newsletter.