



PEOPLE SCOPE

Management Consultancy  
Management Development  
Training • Coaching

## **Must-Do Tips No 22: Watching for CRM Warnings**

A good valuable client of the firm, a long trading track record, harmonious personal relationships...and then within the space of months, everything changes for the worst. Instructions start to tail off, calls go unreturned, and you get the dreaded news that the business is to be put out to tender. Shock! Horror! Why?

Good Client Relationship Management is about recognising and being prepared for the warning signs that can presage such occurrences. What are these signs? This month, three top event tips to watch for that could turn into a yellow (or red) card for your firm.

### ***Tip 1 - New Kids On The Block***

When you were young and your heart was an open book...NKOTB were still to be treated with initial caution. Doubly so, in a professional client relationship where incomers are highly likely to have their own supplier contacts. Yet how often do we see professional firms not even respond to such an eventuality, blithely assuming that things will go on as they always have done? Too often. And they can and do suffer as a consequence.

### ***Tip 2 - It's Who We Don't Know..***

Here's another complacency scenario we see played out frequently. A key client, multiple contact points in both organisations at working level that generate significant work for us..and a few crucial contacts at senior level who are not on anybody's radar. Usually, this is because they are "important people" and therefore difficult to access - or just plain difficult! "Anyway, they don't give us the work do they?", chimes Partner A, "So why bother with them?". But they CANNOT be ignored. However difficult it may be, they must become someone's responsibility in the firm. Otherwise, one day you may find access to all contacts reshaped permanently - in another firm's direction.

### ***Tip 3 - Got 'Dem Reorganisation Blues***

Corporate organisations, don't you just love them? Always changing, people moving on, or the pack being reshuffled for the nth time in a few years. Trouble is every time that reshuffle happens, their buying roles can change - regular contacts become decision-makers, specifiers become regular contacts - and vice versa all round. Checking them out when this happens is vital - or you can find that work dries up..or worse.

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*Presenting With Power*  
*Better Client Reviews*  
*Avoiding Tender Traps*  
*Coaching for Professionals*  
*Selling Blind Spots*  
*Creating Change*  
*Negotiating The Professional Way*  
*The Interviewing Challenge*  
*Life Beyond Client Entertainment?*  
*The Exhibitions Black Hole*  
*Failing to Client Plan...*  
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Best regards.

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