



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 that 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.

People Scope offers workshop programmes and consulting advice to professional firms on Client Care and Client Relationship Management - for more information, hit 'Reply' and type **CRM**. For more general information about what we do, go to [www.peoplescope.com](http://www.peoplescope.com).



We welcome feedback from you on what you think about "Must-Do Tips". If you like it hit 'Reply' and tell us specifically what you like. If there is a topic or issue that you would like us to cover, what is it? And if there's something that annoys, tell us too! We want to improve.

Need a stimulating contribution to your in-house publication or newsletter on Business Development, Client Relationship Management, or Professional Leadership from an expert? Call or email us and we will do our very best!

If you think someone else might be interested in receiving "Must-Do Tips" tell them about us.

If you do not wish to receive "Must-Do Tips", press 'Reply' and type 'Unsubscribe' and we will do exactly that.

Best regards.

**JAMES NEWBERRY**

People Scope, 6 River Court, Chartham, Canterbury CT4 7JN, United Kingdom. Telephone: 01227 730411.

This message contains information that may be privileged and confidential and is the property of People Scope. It is intended only for the person to whom it is addressed. If you are not that person, you are not authorised to read, print, retain, copy, disseminate, distribute, or use this message or any part thereof. If you receive this message in error, please notify the sender immediately and delete all copies of this message. Our computers are virus-protected on a regular and ongoing basis. We hope that you don't catch anything from us, but we can't accept any legal responsibility if you do.

**Copyright People Scope 2006**