Must-Do Tips No 37: Professional Client Discussions Part 2

In Part 1, we looked at some of the essentials of what professionals should do *before* a client review meeting. So if this stage is completed successfully, what of the meeting itself? Well, to a very large extent, we are in 'bandit country' as far as a lot of professionals are concerned. Many are not used to having such a dialogue – I mean, actually ASKING clients about how they think things are going? Talking about business-related issues that aren't really within our technical comfort zone?

Usually, a degree of reframing is required to get your lawyers, accountants, architects or consultants to see that not only is this activity extremely valuable, but that it requires them to view the client in a different way if they are to be successful at it. Here are three things to help them on their way.

Tip 1 – "How Are We Doing Then?"

This is a meeting about what the client thinks. So why is it that some professionals see it as an opportunity to break out their own Blarney Stone and proceed to talk for Britain? Nerves, maybe? Perhaps a lack of preparation? Or most likely they just don't get it. Used to wielding expert power in the presence of clients, that position has to be reversed for this sort of meeting. THEY talk. YOU listen.

Tip 2 – The Right Issues

"So what can we talk **about**?" is a common refrain from professionals inexperienced in this arena. Well, there are three major areas for potential exploration (there are others):

- The client's business/future plans and thus potential service needs
- Service portfolio – his/her awareness of what you offer and usage of different services
- Service priority & satisfaction – which service aspects are more/less important to the client, and how we are doing.

Tip 3 – Clear Actions & Follow-up

Fascinating conversations are useless if they lose the name of action. Agreed actions must be recorded and shared with the client and the 'home' team. The process of ensuring that things happen is the responsibility of your client reviewers. If this does not happen (and we know quite a few for whom this is a blind spot), the client will judge our professionals against their other providers who are more efficient. And that can lead in only one unfavourable direction…

People Scope helps professionals to conduct their client meetings better. For more information, hit 'Reply' and type **Professional Client Reviews**.

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Best regards.

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