

## **Must-Do Tips No 47 – Working Well With Clients**

On the face of it, this is possibly our daftest newsletter title yet. After all, why would any professionals NOT want to work well with their clients? But, strange as it may seem, there are quite a number of firms, their partners, and associates or managers who appear to go out of their way to prove just how out of tune and touch that they are with the organisations they serve. And often they get what they deserve...

**"Having received nothing in the past six months, unannounced, they then just sent me a huge bill that blew my budget big-time and put the finance people here into orbit! Personally, it caused me a huge amount of grief. You can imagine how keen I am to use that firm again"**

This month we offer three things to make the important job of working well with clients...work well. And they have a common theme which is..

### ***Tip 1 - Be business-like***

Probably the biggest issue for most commercial clients is how unbusiness-like their professional advisers can appear. In their world, providing estimates of cost and agreeing a budget, getting bills out regularly, being rewarded for successful performance rather than 'time served' etc., are pre-requisites for success in serving their external or internal clients and customers. Increasingly, they bring these expectations to dealing with us. Which unfortunately is what many firms still do NOT do. The good professionals we come across get to know how their clients operate in their world, and **then** tailor what their firms do to match this. As a result, clients like them and give them more business.

### ***Tip 2 - Create ways of working***

And by this we don't just mean sending a letter of engagement to new clients and that's it. In much of the business world, client organisations originate and implement specific processes (ways of working if you like) that make the task of defining, agreeing, and delivering on client or customer expectations much easier because it is **all** made explicit to everyone. Unfortunately, the world of the professions can often be immune - and in some cases, allergic - to this idea. "*We are different to other organisations*", they chime, "*you can't bottle what we do*". But they are not and you can. The smart firms have recognised this, and go out of their way to make explicit the service levels that clients can expect, and the behaviours that both parties should adopt to do the work, pay for work done, resolve problems etc.

### ***Tip 3 - Review everything (and learn)***

One thing that we can almost always guarantee in talking with professional firms is that **a)** they usually have some sort of process for reviewing their performance with clients post-transaction, and that **b)** compliance for such review is generally low.



PEOPLE SCOPE

Management Consultancy  
Management Development  
Training - Coaching

For many professionals, reviewing what they have done for clients is neither technically-challenging nor usually fee-generative - thus it is simply not a priority. Moreover, it could be positively dangerous and a threat to their perceived professional competence. After all, what if the client says that (s)he wasn't happy? The best client businesses are more grown up about all this and use such feedback as the lifeblood of gauging their success and making improvements to what they offer. Why should we be any different? So incentivise partners\* to conduct regular reviews and use the feedback - just like clients do.

**\* Incentivisation of professionals to build better client relationships will be part of a forthcoming People Scope CRM Resource Paper entitled "Motivating professionals to succeed". To pre-register for your free copy, hit 'Reply' and type [Motivating Professionals](#).**

People Scope works with firms to help them improve their client experience. To know more, hit 'Reply' and type [Client Experience](#).

Of course you could always:

....go to our website at [www.peoplescope.com](http://www.peoplescope.com).

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

You can obtain free copies of past issues of "Must-Do Tips". Previous MDTs have covered the issues shown below. If you wish to receive any of these issues, just hit 'Reply' and type 'Past Issues' along with the name of the issue(s) that you require.

<i>Professional Leadership</i>	<i>Selling - A Contact Sport</i>
<i>New Business Meetings</i>	<i>"Wot - No Research?"</i>
<i>Developing &amp; Maintaining Contacts</i>	<i>Persuasion Power</i>
<i>Presenting With Power</i>	<i>Understanding The Client's Business</i>
<i>Avoiding Tender Traps</i>	<i>Where Does All The Time Go?</i>
<i>The Trust Builders</i>	<i>The Perils of Pitching</i>
<i>CRM's Building Blocks</i>	<i>Presentations - Avoiding Boredom</i>
<i>Creating A Sales Culture</i>	<i>Seeing CRM Work</i>
<i>3 Things They Hate About Tenderers</i>	<i>Back to (BD) Basics</i>
<i>Stand &amp; Deliver (Exhibition Selling)</i>	<i>Building Professional Relationships</i>
<i>Watching for CRM Warnings</i>	<i>The Rules of Networking Pt 1</i>
<i>Professional Client Discussions Pt 1</i>	<i>The Rules of Networking Pt 2</i>
<i>Professional Client Discussions Pt 2</i>	<i>Perils of The (Sales) Pipeline</i>
<i>To Appraise or Apprize?</i>	<i>Xmas Greetings &amp; Gifts (2007)</i>
<i>The Decision-Maker Dance</i>	<i>The Best-Laid Client Plans</i>
<i>Beyond Stalkerdom</i>	<i>The Holy Grail of Referrals</i>
<i>Added Value or Commodity?</i>	



Finally, if you do NOT wish to receive "Must-Do Tips", press 'Reply' and type 'Unsubscribe': 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 2008**