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## **Must-do Tips No 57 – The Three Most Neglected 'Touch Points'**

Eagle-eyed readers will have spotted the mention of 'touch points' in the last issue of "Must-do Tips" - ways of maintaining contact with clients or prospects that are usually over and above normal transactional dealings. In these much-straitened times, every and any way to keep 'front of mind' is vital if your professionals are to make the most of their more limited opportunities to do business. So of the many potential methods, which are the best, but most neglected activities that we have come across? In this issue, we identify our 'tip-top 3' most-neglected touch points. Sadly, there are many more that we could have nominated...

### ***Tip-top 1 - Client visit....plus***

It is difficult enough to persuade and uproot many professionals from their workstation to 'get out there' and visit their good clients in their environments in the first place. But, if this can be done, why not go a step further and get them to spend time with their important client contacts on the shop floor, experiencing what it is really like to be at the sharp end of their business? It is a point of policy for many service-orientated business that senior managers do this on a regular basis. Asking to go along for the day with them could prove to be an especially powerful relationship and knowledge-building pursuit.

### ***Tip-top 2 - Losing (& winning) de-briefs***

Many professionals still do not undertake post-pitch debriefs - with existing or prospective clients. Of those that claim they do, the results can be rarely insightful - 'we were too expensive' being the mantra played back by most if they lose. Often, the rigour with which they undertake the conversation is badly lacking and so, for some clients, a poor reflection on the professionalism, client-centredness, and quality-orientation of their advisers. So, provide them with the questions to ask and check if they used them. If all else fails, go along or be with them when they do it. And make sure that de-briefs are done for pitches that were **won** too - the insights delivered are just as valuable as losing ones.

### ***Tip-top 3 - At the point of billing***

This is one to frighten the horses in many professional environments where mere mention of the word 'money' is likely to induce minor apoplexy (law firm partners in particular). As a result, billing issues are a major source of frustration, anger and resentment for many clients (that's what they tell us anyway). Professionals who feel brave enough to call the client at the point of billing - to update them on what the position is and iron out any issues - have identified a 'touch point' that many clients say they would much appreciate. Rather than those difficult, often tetchy conversations that can occur after the bill has landed.

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Best regards.

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