Must-do Tips No 75 - Better Client Relationship Engagement

How to get associates or managers more actively involved in client relationship development?

A frequent story we come across is the one about "the tired and exasperated client partner", leading the charge to create the deep, lasting and creative relationships which clients say they value. Knowing that this has to be a team effort, (s)he brings together at a meeting or away day the wider client team....to face a room of junior - and maybe not so junior - faces who sit and say nothing.

This could be for any number of reasons - shyness or lack of confidence, knowledge or empowerment. But whatever the cause, their contributions are important to the development of relationships with the client. So such reticence represents a significant set-back. This month, we have three things to help foster the interest and effective participation of junior professionals in their role as client relationship developers.

Tip 1 – we can map it out

It's amazing what a piece of collective endeavour can do to break down barriers and get everyone contributing. A simple but effective exercise around "who do we/you know and how well?" can generate interest, involvement....and sometimes revelation. Collating this collective data into a client relationship map is an extremely powerful tool for discussion, analysis and action. Properly facilitated, the process to achieve it means that everyone's contributions are equally relevant so any perceived hierarchy is set aside. Revelation - and sometimes big surprises - can come from the contributions of team members at all levels as information is exchanged, a deeper understanding of individual goals is reached, and the walls of office or practice area 'silos' begin to break down.

Tip 2 - involve <u>RELEVANT</u> clients

One well-known and effective tactic for educating staff in the ways of the client is to ask a client contact to come along and talk about his/her experiences and needs. However, some client partners miss a trick here if they want to involve and relate better to junior staff. Why? Because often the client that gets invited is at partner-level who then contributes relevant, high-level insights.....to which many associates are unable to relate from their day-to-day view. Savvy partners also generate client input from the contacts of team members at ALL levels, with equally useful insights that capture the full attention of associates and managers.

Tip 3 - prioritisation is a priority

There is an art to gaining continuing involvement and enthusiasm for CRM work from the team. Part of this art is to make the action-orientated end of things as manageable as possible. However, the big bear trap to avoid is the dreaded, all-purpose, unfocused 'action list'. Too often, these lists become the sole focus of attention, with scant regard to achieving what is important in them. Eventually, their length can become de-motivating, less and less is completed, they start to roll over from month-to-month, and team effectiveness nose dives as a result.

Agreed actions are best broken down into shorter, relevant task chunks that are prioritised according to their urgency and importance. These can then be delegated appropriately to specific individuals, with the enhanced likelihood that they will be fully understood and completed.

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Best regards.

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