



5 Easy Strategies for Maximizing Client Relationships from Behind the Desk

Successful client relationships are like any relationship, and they take work. It is no different than your relationship with your spouse, significant other, children, or best friend. We have to be intentional to build healthy relationships. Many people think that business development only takes place out on the golf course or in informal meetings, however business development is everyone's business and can take many forms. Many business development activities can be performed by those who never step foot out of the office, but directly interact with clients. The following strategies can be utilized by anyone from full-time business developers to project managers. They take a small amount of time but will have a tremendous impact.

1. Communicate.

- **Listen.** Listening is the most important thing you can do for your clients. When you speak with a client remove distractions, be engaged, and listen. It may mean calling the client back later when you can focus on the conversation or turning around from your computer. When we listen, we pick up on cues that can tell us a lot about how the client is feeling about the job we are doing.
- **Check-in for no reason.** Call your clients and ask if you can do anything to help them or ask about their holiday or vacation. Surprise and delight them by calling with no agenda.
- **Gather intel.** In the process of working with your clients, ask questions. Take a few extra minutes to learn more about your clients and their needs. Ask if they have any future projects that would be an excellent fit for your firm. Share the intel with your market leaders and marketers to help position your firm in the future.
- **Send note cards.** We receive 30,000 commercial messages a day. Stand out by sending a client a note card. Make it simple: we appreciate you as a client; thank you for your business; happy birthday, great to meet you. We are all pleasantly surprised when we go to our mailbox and there is something other than junk - it just may brighten your client's day.

2. Connect.

- **LinkedIn.** LinkedIn is an excellent resource for getting to know your clients and finding common interests. Connect, follow, and share.

ABOUT ELEVATE MARKETING ADVISORS

Elevate Marketing Advisors develops marketing and business development campaigns to invigorate your brand, differentiate your firm, and drive business to your bottom line so you stay focused on design and delivery of your discipline.

We are driven to help people and firms realize their beyond through relationship, advocacy, and an elevated client experience. We do this through a daily commitment to our guiding principles:

- Embrace Authenticity
- Reject Mediocrity
- Invest in Relationships
- Deliver with Intention
- Have Fun and Kick Ass!

Maximizing Client Relationships from Behind the Desk, continued

- **Say my name.** People love the sound of their name, so use it to connect!
- **Send items/intel of value.** Value is relative to the person. It could be a restaurant recommendation for an upcoming vacation or a five (5) tips list that applies to a future project. Clients hire firms who show value in a variety of ways.
- **Guide your clients through your services.** Review a report with your client, call after you send deliverables, and ask if you can answer any questions. Walking your clients through the project process will improve their experience while giving you a wealth of knowledge in understanding their needs.
- **Debrief.** Ask your clients to share honest feedback when not selected for a project, helping you to a better position in the future. If chosen, it is even more important to ask why to understand real firm differentiators.

3. Care.

- **Be client-centric.** Engage. Ask questions. Know your clients personal and professional goals. Treat them as you would a friend and in all things be genuine. Strong client relationships lead to more work and a better working relationship.
- **Be responsive.** We all want to feel important. If you want your client to feel important, you must be responsive. Even if you do not have the answers, be sure to respond that you will get back to them as soon as you do.
- **Don't take your clients for granted.** We tend to take our closest relationships for granted. Do you assume your best clients will keep hiring you? There is a line of competitors showing your clients attention. At some point, they will give them a shot unless you show them the same.
- **Show your passion.** We all like to work with people who are passionate about what they do. Your clients are no different. They want to know that the person they are entrusting with their project is just as excited about a successful outcome as they are.
- **Seek client feedback.** Don't wait until the project is over to seek input. Ask throughout the project if you and your team are meeting your client's needs and how you can improve. Client savvy's client feedback tool is a great resource to help you do this.

4. Educate.

- **Educate yourself.** Understand your firm's history, mission, vision, values, and strategic goals so you can speak to clients about your firm with confidence. Understand your client's so you can understand their needs and frustrations, and you will help position your firm to win. Understand the market by reviewing current research such as Zweig Group surveys and association or associated? publications so that you can have educated conversations with your clients. Share what you learn with your colleagues, leaders, and marketing team to position your firm to win.
- **Educate your clients.** You learn something every time you complete a project. Share your knowledge with your clients. Position yourself as an expert to build trust with your client.

5. Prioritize.

- **Make business development a priority.** Create daily bookends by scheduling five (5) minutes of business development activity before you start your day - before you check your email, and before you leave the office. Schedule this in your Outlook and follow through every day.

Remember, the most successful client relationships take persistence, time, and effort to be effective. If you want to maximize your efforts, utilize your entire team - **business development is everyone's business.**