

Client Relationship Engagement Plan

Managing Key Executive Relationships at Your Clients

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Client Relationship Engagement Plan

Date _____

Client _____

Individual Name _____

Position _____

I. Current Relationship Level and Goal* (place an x)

	1 Don't Know Them Yet	2 Met a Few Times	3 Good Working Relationship	4 Very Strong Relationship	5 Trusted Advisor
Current Level					
Goal in 12 Months					

II. Business Agenda of 3-5 Critical Priorities, Needs, or Goals

1. _____
2. _____
3. _____
4. _____
5. _____

Rate Your Understanding

Don't know their agenda Moderate Understanding Full Knowledge of Agenda

1 2 3 4 5

III. Personal Agenda (career, self, network, family, etc.)

1. _____
2. _____
3. _____

Don't know their agenda Moderate Understanding Full Knowledge of Agenda

1 2 3 4 5

*See checklist on page 4, *Characteristics of a Great Relationship*

IV. Adding Value to this Relationship

Given this person's business and personal agenda, how can you add value along these four dimensions: Thought Leadership (ideas and content), Network, Personal Help, and Fun.*

Thought Leadership (what relevant ideas and content can you share?)

1. _____
2. _____
3. _____
4. _____

Network (what valuable introductions can you make?)

5. _____
6. _____
7. _____
8. _____

Personal Help (how can you help them with their personal agenda or with a need they have in their personal lives?)

9. _____
10. _____
11. _____
12. _____

Fun (is there something outside of work you could engage in?)

13. _____
14. _____
15. _____
16. _____

*See checklist on page 5, *Adding Value to Your Stakeholders*

V. Action Plan to Develop This Relationship Over the Next Two Quarters

January	February	March
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
April	May	June
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____

VI. Relationship Building Checklists

Characteristics of a Great Client Relationship

1. *Trust*: How strong is the client's trust in your professional competence, in you as a person and in the firm as an institution? Can you work informally, without constant checks and controls?
2. *Personal knowledge and understanding*: You don't have to be (and in most cases shouldn't be) a good "friend" with your client. But you do need to understand him or her as a person, and vice-versa. Without this personal dimension to the relationship, it will always be arms-length.
3. *Thought leadership*: Are you perceived as a trusted business advisor who brings both subject matter depth *and* broad business knowledge and judgment to the table? Are you shaping and leading the client's agenda, or simply reacting to it?
4. *Inner circle*: Do you have a "seat at the table" for significant strategic and operational conversations and decisions in your area of expertise?
5. *Transparency and communications*: Does the client openly share information with you about their plans, programs, priorities, upcoming initiatives and so on?
6. *Loyalty*: Will the client always use you and the firm in areas of acknowledged competence?
7. *Reference-ability*: Would this client simply provide a passive reference if asked, or are they *actively* promoting you and your organization to colleagues and friends and creating referrals for you?

Adding Value to Your Stakeholders

Remember that the point is not what the other person can do for you but what you can do for them. For each key stakeholder you are managing, ask yourself:

- Do you understand their agenda of critical priorities, both on a professional and personal level?
- Is there a *particularly important* issue this person is working on or a goal they are pursuing right now?
- What can you do to help them accomplish their agenda and succeed?
- How well do you *really* know these individuals, on both a personal and a professional level?

Fundamentally, you should think about four categories of sustaining activities:

1. *Ideas and content.* Follow up with ideas, suggestions, perspectives, articles, white papers, publications, research studies, books, etc. Lunch or dinner can be time-consuming and intrusive for some people, whereas having a cup of tea or coffee is a more digestible interlude. When you call someone and say, “I’ve been thinking about that issue you mentioned during our last conversation, and I’ve got a couple of ideas I’d like to share with you...” he or she will rarely turn you down.
2. *Connection.* You can add great value by connecting your key contacts to other people in your network. Remember—your and your firm’s relationships and networks are proprietary—no one else can copy them and offer them to their own contacts.
3. *Personal help.* Occasionally you will have the opportunity to give a helping hand to a client or colleague. Are they new in town, and need help navigating schools and health clubs? Do they have a son or daughter who is applying to university and would benefit from talking to you about your alma mater? Are they in between jobs, and need help refining their resume and gaining introductions to executive search firms? There are endless ways you can be helpful to your most important contacts.
4. *Fun.* The age of “schmoozing” seems to be over. But, some people still do like to have fun and would enjoy an invitation to a special sports event, concert, gallery opening, dinner, and so on. This can be an excellent way of getting to know someone on a more personal level.

How Well Do You Really Know Your Client?

Client name: _____

THE BASICS

As a person			As a professional		
Level of knowledge			Level of knowledge		
Needs work	Good		Needs work	Good	
<input type="checkbox"/>	<input type="checkbox"/>	Spouse/partner, children	<input type="checkbox"/>	<input type="checkbox"/>	Preferred means of communication (e-mail, phone, face-to-face, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	Other family: parents, siblings	<input type="checkbox"/>	<input type="checkbox"/>	Work style (early/late, weekends, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	Educational background	<input type="checkbox"/>	<input type="checkbox"/>	Personal assistant: background, interests
<input type="checkbox"/>	<input type="checkbox"/>	Where he/she grew up	<input type="checkbox"/>	<input type="checkbox"/>	Career history: accomplishments, positions held
<input type="checkbox"/>	<input type="checkbox"/>	Interests outside of work	<input type="checkbox"/>	<input type="checkbox"/>	Professional and alumni associations
<input type="checkbox"/>	<input type="checkbox"/>	Favorites: restaurant, author, movie, vacation, etc.	<input type="checkbox"/>	<input type="checkbox"/>	Conference participation

DEEPER KNOWLEDGE

As a person			As a professional		
Level of knowledge			Level of knowledge		
Needs work	Good		Needs work	Good	
<input type="checkbox"/>	<input type="checkbox"/>	Formative life experiences	<input type="checkbox"/>	<input type="checkbox"/>	Strengths and weaknesses as an executive
<input type="checkbox"/>	<input type="checkbox"/>	Personal issues he/she may be grappling with	<input type="checkbox"/>	<input type="checkbox"/>	Role models, mentors
<input type="checkbox"/>	<input type="checkbox"/>	Non-profit or charitable involvement	<input type="checkbox"/>	<input type="checkbox"/>	Career goals and aspirations
<input type="checkbox"/>	<input type="checkbox"/>	Personal style: introvert vs. extrovert; detail oriented vs. focused on the big picture, etc.	<input type="checkbox"/>	<input type="checkbox"/>	Most concerning issues right now
<input type="checkbox"/>	<input type="checkbox"/>	Risk tolerance	<input type="checkbox"/>	<input type="checkbox"/>	Quality of relationship with his or her boss
			<input type="checkbox"/>	<input type="checkbox"/>	Relationships with key direct reports (do you know them?)
			<input type="checkbox"/>	<input type="checkbox"/>	Corporate directorships, other affiliations
			<input type="checkbox"/>	<input type="checkbox"/>	Other executives he/she associates with
			<input type="checkbox"/>	<input type="checkbox"/>	Most important networks and relationships

Power Questions to Better Understand Your Clients

Understand their issues

(Naturally, the more tailored these are to your specific client and their industry, the more effective they'll be)

1. How will you and your area be evaluated at the end of the year? What are the major goals you're being asked to accomplish by your leadership?
2. What priorities are you personally investing time in this year?
3. Why do you want to do that?
4. What additional capabilities do you need to put into place to support your new strategy?
5. Where will your future growth come from?
6. As you think about the future of your business, what are you most excited about? Concerned about?
7. Deciding to do X was a bold move. I'm curious about some of the choices you made—can you share with me why you ...?
8. What are your most significant opportunities for growth over the next several years?
9. I'm familiar with the broad outlines of your strategy...my question is, how are some of these initiatives, like becoming more market-focused and reducing your cost infrastructure, affecting your own particular area?
10. What exactly do you mean when you say...? (risk-averse, dysfunctional, challenging etc.)
11. What would your best customers say are the main reasons they do business with you?
12. Why do customers leave?
13. How have your customers' expectations changed over the last five years?
14. What's the driving force behind this particular initiative? (e.g., What is behind the drive to reduce costs, Design a new organization, etc.)? (or, Why did you decide to do that?)
15. What would better (risk management, cost controls, organizational effectiveness, etc.) look like?
16. In which areas do you wish you were making faster progress?
17. This issue you've been talking about—would you say it's one of your two or three biggest priorities this year?

Connect to higher-level goals

1. Why is that happening?
2. Why did you decide to do it that way?
3. Why do you think this approach is best for you?
4. What stimulated you to look at this issue now?
5. What business goal is driving this?

Explore an identified need

1. How much do you think this is costing you?
2. Have you estimated what it's worth to fix this?
3. What do you think that opportunity is worth?
4. How is this affecting other aspects of your business? (How is this impacting sales? Costs? Productivity? Morale? Etc.).
5. If you do not address this (problem/opportunity), how might your business be impacted?
6. How do you know that...? (turnover is high, productivity is low, risks are not being well managed, etc.)?
7. Why is this important to you right now?
8. Would you say this one of your top three or four priorities?
9. How much time do you personally devote to this issue?
10. Can you give me an example of that?
11. What solutions have you already tried and how successful were they?

Get to know them better and build a personal relationship

1. What's the most fulfilling part of your job? The least fulfilling?
2. How did you get your start in this business?
3. Where do you think you'd like to go in the organization from here?
4. I'm curious—what has been the most important developmental experience in your career so far?
5. As you think about your own legacy as a manager and leader, what would you like to be remembered for?
6. What do you feel has been your greatest accomplishment?
7. As you think about what you've learned in the course of your career—what advice would you give your younger self about how to succeed?

8. When you look back on the different positions you've held/jobs you've had, what's been your most memorable one?
9. If you hadn't gone into (computer science, business, law, accounting, engineering, etc.) what do you think you would have done?
10. Can you tell me about where you grew up? How did that influence you?
11. Is there something you've always wanted to do—a sport, hobby, trip—that you've just never gotten around to?
12. You've had a very successful career...Is there anything else you would like to achieve?

Meet with top executives

1. **Challenge them:** How did you arrive at 10% as a target? Do you feel that's sufficiently ambitious? How would you describe the gap between your current leadership and the skills and capabilities you'll need in three years' time?
2. **Ask about implementation:** How would you assess your progress in creating a more client-centric culture? What do you feel you've accomplished, and where are you lagging?
3. **Bring in internal insight:** In working with your people over the last six months, we've observed a tendency towards risk avoidance, leading to slow decision-making. Does that square with your own view? What do you think is behind that behavior?
4. **Ask about the external environment:** Why do you think (competitor X) has grown so rapidly in that market? or, Some of your competitors have created virtual customer communities...do you have any initiatives in this area?
5. **Help redefine the problem:** In my experience, changing the organization structure won't have the impact on collaboration unless you also address things like your measurement and reward system and your decision making process. What do you think is really at the heart of the lack of teamwork?
6. **Ask about organizational effectiveness:** How do you feel about the dynamics within your senior team? or As you think about your senior team, what skills or capabilities do you wish you had more of? or What do you think is holding people back from accomplishing this?
7. **Learn more about their thinking:** What do you think your options are to... (grow your European business...reduce your customer acquisition costs...improve your share of wallet...etc.)
8. **Understand what makes them tick:** What was your most important developmental experience in becoming a leader? or Have you ever experienced a setback in your career? How did it affect you?