

Prioritizing Your Relationship-Building Efforts

Key Groups of Relationships

Current Clients

- Executives you are actively working with
- Executives at your client that you'd *like* to get to know

Former Clients

- Past clients who know and like you and ZS

New Relationships

- Strategic, targeted prospective clients
- VIP contacts in your network

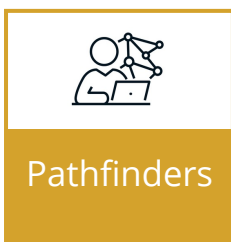
Three Types of Individuals



- Can authorize a decision to buy from you
- Positive (or at least neutral) opinion of you and ZS
- Control or can obtain budget
- Respected in their own organization
- Motivated to make change happen
- Are likely grappling with a specific challenge



- Know the decision-makers you want to work with and can influence them
- Trusted by leadership
- Positive opinion of you and ZS
- Motivated to help and coach you



- Can introduce you to a decision-maker or an influencer, and/or can provide you with intelligence and insight
- Ideally, trusted by decision-makers and influencers
- Positive opinion of you and ZS
- Motivated to help and coach you

Understand Potential Growth Catalysts

Growth catalysts are events which can help create an opportunity for relationship growth. Keep an eye out for these! For example:

<i>Look for These Growth Catalysts</i>	
✓	A change in strategy or direction
✓	A company crisis
✓	A client's personal career change or personal crisis
✓	A reorganization
✓	A new executive
✓	A step-change environmental event
✓	New competitive dynamics
✓	New opportunities created by technology
✓	When an incumbent competitor makes a mistake, becomes complacent, or undergoes staff turnover

You can also *create* potential relationship growth catalysts—for example:

- Ask for feedback—e.g., do a relationship review
- Make an investment in the relationship
- Find a new executive buyer
- Change the relationship environment (e.g., get your client out of the office)
- Bring new ZS colleagues into the relationship
- Talk to your client's customers to gain insight (and if possible, shareholders, suppliers, competitors, etc.)
- Propose longer-term partnership arrangements
- Invite your client into a joint account planning workshop
- Conduct a ZS capabilities showcase

Worksheet: My Relationship-Building Priorities

Under each of the three major groups, list the names of executives who will be the focus of your relationship-building and outreach efforts. Put a check mark in the appropriate column on the right.

Most people should prioritize deepening relationships with current, high-potential clients and staying in touch with past clients—the most promising opportunities usually develop through individuals who already know and trust you and ZS. However, depending on your role and client development objectives, you may also be focused on targeting new, prospective clients and reaching out to your network of contacts on a weekly basis.

I. Current Clients

List the names of executives with whom you would like to strengthen your relationship	DEC=Decision-Maker INF=Influencer PATH=Pathfinder		
	DEC	INF	PATH
1.			
2.			
3.			
4.			
5.			
6.			
List the names of other executives you would like to get to know in your client's organization			
1.			
2.			
3.			
4.			
5.			
6.			

Remember the basic relationship-building sequence: Develop rapport and trust, understand their agenda of critical priorities, establish your credibility as needed, add value during the conversation, and identify a helpful next step. Each meeting should ideally lead to another conversation, with the ultimate objective of identifying an important issue that could be the focus of future work together.

II. Past Clients

	DEC=Decision-Maker INF=Influencer PATH=Pathfinder		
	DEC	INF	PATH
1.			
2.			
3.			
4.			
5.			
6.			
7.			

III. New Relationships

For example, new target clients you want to develop, or VIP contacts in your network	DEC=Decision-Maker INF=Influencer PATH=Pathfinder		
	DEC	INF	PATH
1.			
2.			
3.			
4.			
5.			
6.			
7.			

Summary: Prioritizing Your Relationships

- ✓ Current and past clients who know you and trust you usually offer the greatest opportunities for near-term growth.
- ✓ New clients are also important to long-term growth, and therefore it's important to maintain outreach to your network and be "top of mind" when the inevitable challenges and crises arise for the other person.
- ✓ Your ultimate goal is to build trusted relationships with decision-makers. It's also important to have good relationships with influencers and pathfinders, some of whom will become decision-makers. Therefore, they also need to be on your priority lists. But ultimately, only *decision-makers* can authorize your engagements.
- ✓ You should always drive towards a live and ideally in-person meeting where you can build rapport and trust, explore the other person's most pressing challenges and priorities, and add value in the conversation.
- ✓ At a certain point, a general conversation about the client's needs must shift towards exploration of a specific, important challenge of mutual interest. Otherwise, things will stall, and you'll never get yourself into the position of being able to actually help the client grow and improve their business.