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TWENTY QUESTIONS

Developing a Client-Centric Dialogue

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In the process of business development, we identify, research, and meet with potential clients with whom we want to work. As a result of learning about their needs and goals, we are able to develop and present solutions that generate projects for our firms. Even if they don't have immediate needs, building the relationship can lead to opportunities later on.

However, too often, marketing and sales representatives spend way too much time talking about: 1) their company and its history (bad), or 2) themselves and their personal experience (worse). They put the emphasis on "who we are" and "what we do" and, especially "why we are great" and end up "we-weing" all over the potential customer. One client described it as, "They show up, and throw up."

Marketing is all about message. Business development is all about relationships. Sales are all about meeting a specific need. If your marketing effort has provided a consistent message that communicates the value of your service, you may get the opportunity to build the relationship in the business development stage. Without it you will never get to the "sale."

The initial dialogue with a potential client is a method to gather diagnostic information. It provides opportunity for analysis and synthesis of key insights into their needs, fears, experience and goals. The focus of this first encounter should be on the non-physical (the whys and why nots) that the results of the project need to accomplish. Use the discussion to identify their concerns, feelings, and priorities.

There are three simple elements to a successful client development meeting. First, control the energy of the meeting. Let the client talk; you'll get your chance later. Next, be comfortable. Set the meeting environment for your comfort, not theirs. This will allow you to stay in the moment. And finally establish authority. Be firm and strong, take charge (but be professional). Being self assured sets you as the expert in their mind.

There is a simple process to a successful dialogue. It includes 20 basic questions. There can be more, but rarely less. It is important to stay in sequence. This will lead the client to sharing important information and position you for a successful response.

Before you begin, state the agenda. Begin the meeting by saying ***"I'd like to take a few minutes to find out about your project and some of your concerns, and then answer any questions you may have about our firm."***

Most meetings start with the normal kind of ice breaking; small talk about the weather or current events. That's OK. Let the conversation follow your style, but always be aware of theirs. Don't try to be what you are not. And, as noted before, don't self-aggrandize. There is nothing more off-putting in the initial phase of building a client relationship than ego-centric diatribe. Use a notepad. Take copious notes. It shows interest and gives you key points to follow-up with later.

Determine Goals

In the first step, determine their basic needs, objectives and concerns.

1. ***What do you have in mind for the project?***
2. ***What concerns or goals do you have for the result?***
3. ***What kind of help do you need on the project?***

Use open-ended questions (who, what, where, why & how); avoid questions that can be answered yes or no. Listen for any words that imply ambiguity for their needs, investment, or image. Explore service delivery options derived from those words.

Summarize by saying, ***"I understand your goals are…; your concerns are…; and, your objectives are…"*** This active listening technique helps the client know you are listening and understand their concerns.

Gather Names

Again, using open-ended questions, explore key decision makers and outside influences that may be important in securing the approval for the project.

4. ***Whose idea was the project?***
5. ***Who supports the project?***
6. ***Who is opposed to it?***
7. ***What is the source of funding?***
8. ***Who is already working on the project?***

And again, summarize by saying, ***"I understand this project started as…; the support comes from…; the opposition comes from…; the budget comes from…,"*** etc.

Learn Their Involvement

Learn about their role and their perspective on the project through a series of questions that will help determine decision priorities.

9. ***How did you get involved in the project?***
10. ***How do you feel about the project?***
11. ***Have you seen other projects that you like? Why?***
12. ***What is your role now, and what will it be?***
13. ***Who decides who gets the project?***
14. ***How will the decision be made?***

Again, summarize. It is important to maintain the "active listening" role, both for their comfort and confidence in you, and for your need to ensure that you have heard their concerns correctly.

What They Expect From You

The next series of questions helps to identify their view and understanding of your professional service area and scope.

15. ***How do you feel about other firms you've worked with?*** (Don't point fingers!)
16. ***What kind of firm do you have in mind for the project?***
17. ***What criteria will you use to decide on the firm for the project?***
18. ***What preferences do you have for fee structure?***
19. ***What is the time frame for award of the contract?***
20. ***How much money is allocated for the project?***

Again, summarize.

Promise a Response

Conclude the analysis phase of the meeting with an acknowledgement of their contribution. ***"Thank you for your time. I want to take this information back to our office. Let me bring back a summary of your goals and concerns as we discussed, and our initial ideas for an approach to meet your project needs."*** This sets the stage for on-going dialogue. Set a date for your response, and schedule a follow-up meeting at this time. (A good rule of thumb for all client interaction: "Book a meeting from a meeting.")

Open the Dialogue

At this point it is appropriate to turn the table and answer questions about your firm's capabilities. ***"What questions can I answer that you may have about our firm or our experience?"*** Answer only facts. Do not offer answers to any questions that require judgment, and defer to the team for review of issues. If their time is short (less than 45 minute, typically) only set another meeting to answer other questions and to meet other members of your firm.

This technique, if used properly, will help you focus on developing client-centric dialogue. It focuses the energy on their issues and allows you to position your response to meet their specific goals and objectives. It provides the information you need to answer their questions. And, with responsive and creative solutions, it helps build relationships that will continue to provide on-going work and referrals.

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