WEEK 7
Challenge: Uncover Your Client's Agenda

- ✓ First, read or listen to **Week 7: Anticipate and Agenda Set** in *It Starts with Clients* (pages 111-122 in the hardcover version)

Every client has an agenda of three to five business priorities, needs, or goals that they are focused on in their organization. Client executives also usually have a set of three to five *personal* priorities. If you don't understand these, you're flying blind—you won't know what to focus on and what types of ideas, insights, or points of view to bring forward.

Assignment
Use agenda setting strategies to strengthen your client relationship

Your goal is to bring some new perspectives and ideas to an upcoming client meeting and clearly tie your operational conversations to one or more of your client's key priorities.

1. Think of an upcoming client meeting that you have.
2. Prepare for your meeting by answering the following questions:
   - How can you elevate the discussion beyond a review of delivery, project execution, or the status of your milestones?
   - What new ideas or perspectives could you bring to the meeting?
   - How could you use the conversation as an occasion to clarify the client's evolving priorities or needs, and/or to clearly link your work to those priorities?
   - What "agenda setting" questions could you formulate and bring to your meeting?
3. Write down your ideas and action steps in the worksheet on the next page.

Agenda Setting in Your Next Client Meeting

Name of company: _____ Name of individual: _____	Date of meeting: _____
What actions can you take to introduce agenda setting into this meeting in order to either more firmly connect the discussion to the client's key goals and/or to showcase new ideas and perspectives? *Ask yourself/your team:* 1. How can I elevate the discussion beyond a review of project execution or the status of my milestones? 2. How could I bring some new ideas or perspectives to the session? 3. How could I use it as an occasion to connect our work to the client's agenda of key priorities and/or to help refine them? 4. What thought-provoking questions can I ask?	
Action 1:	
Action 2:	
Action 3:	
Action 4:	

Reflection

How can you ***anticipate*** this client's agenda? What is happening, either inside their organization or in the external environment, that will have important implications for the priorities and issues they should start focusing on?

_____

_____

Checklist: How Well Do You *Really* Know Your Clients?

Instructions: Pick a client executive you would like to deepen your relationship with. Check the appropriate boxes for both the basics and deeper knowledge.

Client name: _____

THE BASICS

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

DEEPER KNOWLEDGE

As a Person			As a Professional		
Level of knowledge			Level of knowledge		
Needs work	**Good**		**Needs work**	**Good**	
☐	☐	Personal agenda of 3-5 most important priorities, needs or goals	☐	☐	Professional agenda of 3-5 most important priorities, needs or goals
☐	☐	Formative life experiences	☐	☐	Strengths and weaknesses as an executive
☐	☐	How they view your relationship	☐	☐	Role models, mentors
☐	☐	Non-profit or charitable involvement	☐	☐	Career goals and aspirations
☐	☐	Personal style: introvert vs. extrovert; detail oriented vs. focused on the big picture; etc.	☐	☐	Most important networks and relationships
☐	☐	Risk tolerance	☐	☐	Quality of relationship with his or her boss
			☐	☐	Relationships with key direct reports (do you know them?)
			☐	☐	Corporate directorships, other affiliations
			☐	☐	Other executives he/she associates with

Checklist: How Well Do You *Really* Know Your Client's Business?

- **Financial performance**. This includes revenue and profit growth, stock price performance, market share, and competitive rankings
- **The organization chart**. Who are the key executives? What are their responsibilities?
- **Strategy and goals**. What is the stated strategy, and what long-term goals have been set?
- **Key operational initiatives** for the next year (e.g., new product introductions, cost-containment, culture change, etc.)
- **Major competitors** and overall industry structure.
- **Industry and market trends**. What are the 4-5 most important trends?
- **The customer base**. Who are the key customers? How concentrated is their purchasing power? Why do they buy from your client?
- **The suppliers**. Who are major suppliers? How much leverage do they have?
- **Partnerships and alliances**. Which are the major ones? How well do they function?
- **Culture.** What is the culture (values and beliefs) like today? What core values do they espouse? What do they aspire to in the future?
- **…**Plus relevant information about the particular function or organizational unit you work with most directly (e.g., HR, Finance, Operations, etc.)