

## WEEK 9

### Challenge: Build a Relationship Growth Plan

- ✓ First, read or listen to **Week 9: Build a Relationship Growth Plan** in *It Starts with Clients* (pages 139-156 in the hardcover version)

Why do some client relationships grow, while others fade? Above all, you have to focus and invest. Specifically, growth begins with setting bold aspirations for the relationship. Then, you need to develop trusted relationships with key executive decision makers. But that's not enough: You also need to make significant "agenda setting" investments in thought leadership. Remember, you win share of wallet by capturing share of mind.

### Assignment

#### Answer seven key questions

Choose a client relationship you manage. It should either be a major client or a small, but high-potential one. To kick off your client development planning, write down brief answers to the seven questions on the next page.

**Here's a reminder about some important client planning best practices you should consider:**

1. Be sure you deliver on what the client has asked you do in the first place, before asking for another contract!
2. Involve your client in designing your account plan so that it truly focuses on *their* agenda—their critical priorities, needs, and goals—not just what you want to sell them.
3. Identify the key executive relationships you need to build or strengthen.
4. Understand both rational and personal agendas for each individual buyer.
5. Think intentionally about how you are adding value to your client today and how you will add value in the future.
6. Once a year, conduct an independent client review, using someone from within your organization who not part of the core delivery team.
7. Get an experienced colleague who is a disinterested, honest broker to participate in the planning process. Ask them to challenge your thinking and propose what may seem like unrealistic ideas.
8. If you're the account leader/lead client manager, ask yourself every year: "Am I still the right person to lead this client relationship?"

## The 10-Minute Client Account Review: Seven Questions

Name of Client: _____
<b>1. Current Position and Aspirations</b> What is our current position with this client, and what are our aspirations?
<b>2. Agenda</b> What is this client's agenda of critical priorities and goals?
<b>3. Opportunities</b> What are the immediate and future opportunities to develop this account?
<b>5. Relationships</b> What are the key executive relationships we need to deepen or develop?
<b>4. Investments in Thought Leadership and Added Value</b> What valuable thought leadership and insight can we bring to this client?
<b>6. Resources and Leverage</b> What people or resources do we need and how can we leverage our organization?
<b>7. Our Plan</b> What is our plan to win the identified opportunities and grow this relationship?