



Maintaining relationships

It would be great if meeting someone and starting a relationship instantly made them a client. It would be wonderful if former clients always remembered us and thought of us. But they don't. That's why professionals need to systematically stay in touch to grow their practices.

Staying in touch maintains a connection you've established. Nurturing that connection shows the other person (prospect, former client, or just somebody you've met) that you are interested in them and in maintaining a relationship with them. Executed correctly, efforts to stay in touch provide value to the other person, let you keep up with what is on their minds (so you can react to that) and communicate your commitment to them.

Frequency of contact

In your approach to staying in touch, you can mix phone calls, emails, serendipitous meetings, meals, commenting on their social media pages, and other methods. Some of your contacts need to be two-way – but not all of them. It's OK to leave a voicemail sometimes or send an email, even if there's no response. They'll note that you are trying to contact them and that you are interested in them. Try to actually talk to someone at least three times per year or you will fall out of touch with them and won't really know what's on their mind.

One of the reasons that staying in touch with personal approaches, e.g., phone calls, hand-written notes, visits, is so effective is that it demonstrates real efforts. If you use a personal approach with someone, you are giving something precious – your time – to demonstrate and to build your connection with them. As once was said about why politicians attend weddings and funerals, “you can't fake showing up.” Showing up (or devoting personal time to someone) means that you actually are interested in them. Showing up and demonstrating a commitment to their success and growth means that you actually do care about them.

Staying in touch with people is a big commitment and a worthy one so you should be efficient about it when you can.

Methods to stay in touch



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The warm call

A warm call is a call to someone that you already know, for the purpose of staying in touch. The heart of making warm calls is to have and hold onto an intent to help the person you are calling succeed – to reach her goals (professional and personal) and to grow and develop. Getting ready for warm calls requires getting in the mood to listen, and being prepared to give. If you listen and are helpful, she will sense it and respond.

Plan before you call

It's good to plan a bit before you dial. Important steps include:

Refresh your memory about where things stood after the last conversation (you can check your notes from that conversation). What business issues were on her mind when you last communicated? What was happening in her personal life?

Update yourself on what's been happening with her company since you last spoke. A few minutes of research on the company website and on the Internet will make sure that you haven't missed anything too big that is public knowledge. Similarly, a quick Google search can make sure that you haven't missed anything about them personally that you should know about (you may not want to bring up things you find via a Google search – it can feel like snooping to some – but knowing can be useful)

Identify your goals for the call. What do you want her to think, feel, be or do differently during and after the call? What do want the next steps to be after this call?

In almost all cases, one goal will be to make sure the other person experiences you as at least trying to be helpful (actually being helpful is better, but trying is sufficient as long as with each person you occasionally succeed). You will probably have a chance to be helpful by listening to the other person and responding to what they have to say, but it's also a good idea to have at least one specific "give" in mind that you can provide.

Possible "gives" include:

- **Provide a warm call recipient with information** – things you have learned about companies, people, trade organizations, government regulations, or anything else that might be useful to him.
- **Be a responsive listener (and learner about them).** Along these lines you can always ask "how's business?" You can try to

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Providing information

It's particularly good to bring contacts information they might not otherwise be able to access. An engineer went to conferences his prospects and clients could not afford to attend, and then he visited with copies of the presentations from those events he "thought they'd find particularly interesting given their challenges"; he'd walk them through what he had learned.

Following up on lost projects

A consultant lost a project to a competitor. Rather than sulk, he emailed the prospect and offered some of his firm's material he thought the (lost) prospect would find useful and said the prospect was free to share it with the winning firm. Ten minutes later, the prospect called back and asked the consultant to meet with him to discuss a different, much larger project.

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understand what she is trying to do, e.g., her particular targets or objectives for the year in business or aspirations in personal life. If you already know her goals and aspirations, you can check in on her progress, and be helpful as a listener or an advisor.

- **Follow up on the projects you lost, and see how they are going.** Provide advice or support anyway, to help your contact get more out of the supplier he's chosen, or to deal with problems that supplier is causing. When, in quick and inexpensive ways, you help your contact in these situations, it gives him the distinct (and accurate) feeling that you want him to succeed. After that, he will be looking for opportunities to work with you.
- **Demonstrate your interest in her.** Just following up on what she said last time – remembering it and referring to it – will convey your commitment to her.
- **Tell him about a potential client for his firm.** Most people appreciate leads.
- **Introduce her to a colleague.** It is a lot easier to wax poetically about the talents of one of the other professionals in your firm than it is to convey the value of your firm in abstract language, and it is more effective to let the talent showcase itself than it is to talk about them. Let her begin to meet other people, if she is interested.
- **Invite him to an event,** e.g., an industry event, one of your firm's marketing events, or a sporting, civic or cultural event.
- **Ask permission to introduce her to someone.** For example, someone who might make a great employee for her firm, someone who is interested in talking to a person like her, someone from your network who might be valuable for her to meet, someone from your network who could use some help from her.
- **Ask him to comment on something you are working on,** e.g., "provide comments about an article I am writing" or ask if you can share "some thoughts I'm wrestling with that I'd like to bounce off an expert like you".
- **Ask her for help.** In a warm call, you can pursue some "gets" after you've given some "gives." It's good to be willing to take help other than an order for a job – so that people who don't have orders to give can still reciprocate, e.g., give you some leads on other people to talk with, suggest potential employees to you.

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Introduce them to someone

A consultant called a former client to introduce a new acquaintance of the consultant to the ex-client – because he thought the former client could be helpful to the new acquaintance. The ex-client said “you know I’ve been thinking about you” and told the consultant he wanted to talk with the consultant about the ex-client’s new business. A consulting assignment resulted from the call.

Structure the call to achieve your goals

In the beginning, you’ll be having a *reunion* with the other person. This is a chance to review where matters stood at your last communication, see how they have progressed on what they were working on or thinking about, and talk about what’s new with them and what’s new with you.

Then the *body* of the call will be your chance to follow the lead of the other person, to provide benefits and to get some benefits. While it is important to have an agenda and a plan for the call, your call arriving may cause the other person to have something to say. They may have something that they want to share with you but hadn’t gotten around to contacting you about (this does happen!!)

Then you are at the *end of the call*. You want it to end in a way that keeps the relationship intact, and ideally with an agreement at the end of the call to talk again. In any case, at the end of the call, you can talk about what you and the person will do before the next time you talk.

After the end of the call, it’s useful to assess how you did on reaching the goals you had established. How have you helped him with his business? How have you strengthened the relationship you have with him? Is there any immediate follow-up that you should do – either because you said you would or because you have a new idea about an action you can take that will build trust.

Providing value in other ways

There are many other ways to maintain relationships besides warm calls. All are ways of providing value. These include:

1. Send them something that you’ve written that is relevant to them.
2. Send them what other people have written. You can find relevant material on the internet, highlight why it might be relevant to them, and send it on. If it’s relevant to more than one person, you can use it for more than one person.
3. Meet for breakfast or lunch. You can have a relaxed interchange that doesn’t feel like business. You can listen to them and be helpful to them.
4. Invite them to an event where they’ll meet other people they’d like to meet.

If they blog or participate in social media, participate with them. Your

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comment on their blog means you are listening to them and responding. You can also take advantage of web-based tools to stay in touch with people, if they use these tools. If they use Twitter, for example, then you can follow them on that and respond occasionally to what they say. If they are on Facebook, or their institution is on Facebook, then you can “friend” them and respond there. If they use LinkedIn you can link with them and answer questions that they may pose.

Less personal approaches to staying in touch are also useful, although less tailored to the needs of the individual. Email newsletters that provide valuable information can advance the relationship – you provide a little bit of value to people (a little trust building action) every month. Webinars can also be used to stay in touch – small webinars can allow a chance for some interpersonal interaction.

Communicate your commitment to them

Feel free to repeat your motive –“I’m contacting you so that I can stay in touch with what you are trying to accomplish so I can help you in any way that I can.”

Staying in touch is vital and hard—so be systematic and targeted

You will lose many opportunities if you don’t maintain relationships with people with whom you’ve started relationships, whether they are potential clients, allies, or former clients. But you will soon have too many people to easily keep track of and communicate with. So you will need systems to support you. In addition, every 6-12 months you’ll need to decide which people to stay in touch with how frequently.

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