

Doing more with your key clients in 2011

Are you extremely valuable to your key clients? Here's how to use a joint planning meeting to help them benefit more from you next year – and help you benefit more from them.

Ideally, you and your clients should talk regularly about their needs and about the value they get from you. Then you always know what they need done. And they know you are a good partner to help them get it done. If you've been talking this way, you've set the stage for a joint planning meeting to together extend your partnership.

If you haven't had these conversations lately, you can start them now (see [Know more about clients' businesses to get more business](#) for how to learn about their needs. See next month's edition about how to think about tracking and measuring value).

Proposing a joint partnership with a client is a big step forward. You need a track record of success with the client to be credible (and successful) in proposing it. And you need strong supporters within the organization to help you figure out who else within needs to be on board and how to get them signed up.



The advantages of a jointly planned year

The biggest advantage, for both sides, is that all of you can focus on tasks that create value for the client, instead of focusing all year on whether you should do more work. You can get out of “business development mode” and not constantly write proposals for projects. You can knowledgeably prepare in advance for the staffing you'll need. You'll can devote all your energy in 2011 to the best business development tactic for 2012 – which is providing huge value to your client.

The joint planning meeting is the first milestone of the jointly planned year

The joint planning meeting outlines your partnership with the client for the next year. At this meeting you, key members of your team and key client executives assess together how best to use your company in the coming year. You've prepared for this meeting. You understand the client's business situation and goals for the next year or two, and the benefits they'll get by achieving those goals. You've carefully documented how those goals affect the kinds of things you might be able to help them with. You've checked with some of your client

organization contacts that you are right. And you've outlined some projects you might undertake and the payoff they would have for the client (using the same "return on investment" metric the client organization uses).

At the joint planning meeting, you and the client can agree on the plan for the year for what you will do together. This plan outlines your commitments to them and their commitments to you. Your commitments to them might include the resources that you'll devote to their projects (including, in larger professional services organizations, the staffing for the projects) and the time that you personally will spend with them. Your commitments might also include your agreement to bring in other people from your own organization or from outside. Their commitments to you include what they'll pay you for the year, and the people they'll provide in order to make the joint efforts successful. You and the client also agree on how you'll interact with different parts of the organization – including the procurement people (if they typically get involved in the kinds of projects you do). In addition to specific projects that are well-defined now, you and the client can also agree on a process you will use over the coming year to identify other valuable joint projects.

At the meeting, you and the client will agree on how to track your progress during the year. You'll also agree on how value will be defined and calculated, and how it will be tracked. And you agree on how to adjust the plan if needed during the year – either because progress is not occurring at the desired pace, or because something happens in the client's company or in the world that calls for a change in plans.

Probably, you'll decide that it makes sense to get together at least quarterly to review progress and to ensure client satisfaction. You might also decide on monthly or even weekly brief progress updates. With the joint plan, you will have laid the groundwork together to ensure that what you are doing – at any moment – is truly valuable for your client and is seen as valuable by them.

Something to try this week

Identify one client where you'd like to try a joint planning meeting. Figure out how much value you've already created for them. Then see if you can write down:

- Their critical business issues for next year
- The value they'd get by addressing those issues
- How you could help them address those issues
- The value you'd be providing

If you have solid responses on each of these topics, begin to talk with people at the client about planning together for next year.

If you don't have solid responses on each of these topics – start working on getting them.

What are these tips?

These monthly tips help professionals create more business and enjoy their work more. We focus on how to start relationships, how to build relationships, and how to convert those relationships into sales.