

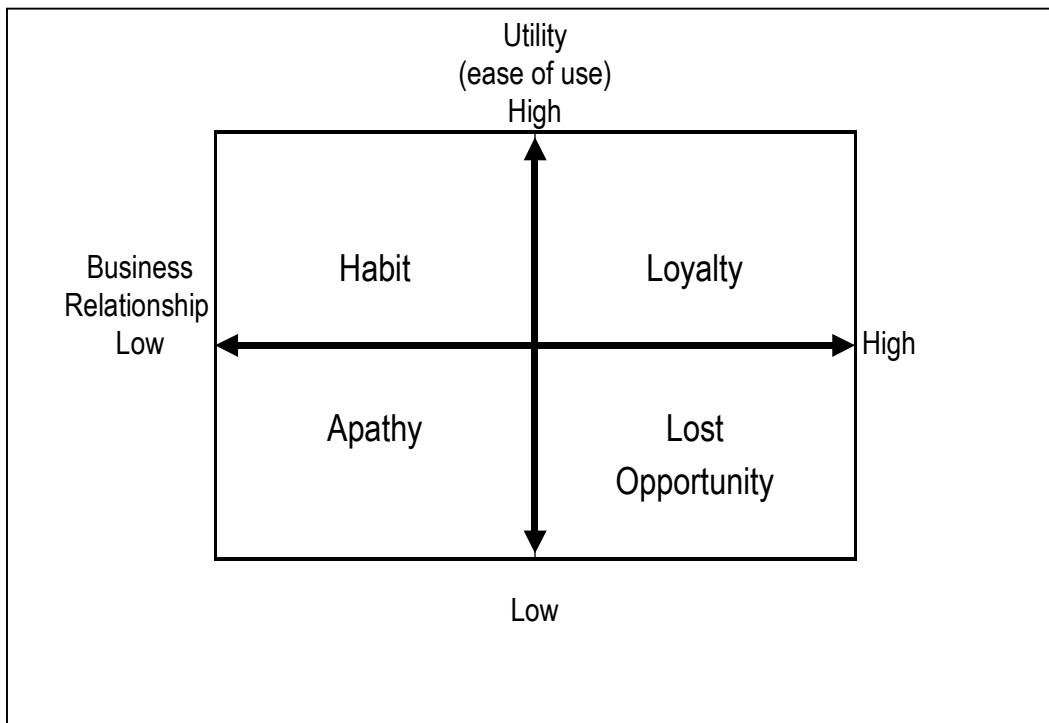
Building Client Loyalty: Clients Have Upped the Ante.

Do your Clients buy from habit or loyalty? Or have they quit buying?

Exercise: Factors that build Client loyalty....

At one time, business relationships and ease of doing business were key differentiating factors for winning business. Clients have upped the ante. More is needed today.

If clients are viewing your offerings with apathy or are you losing sales you once won, the questionnaire on pages 2 and 3 may help you identify gaps in your business development efforts.



On the following pages rate how well you measure up?

INSTRUCTIONS: Individually take 5 minutes to look at your Client profile of how well you sell and serve either a particular client or your clients in general.. On a scale of 1-10, how well does your organization or firm meet the following factors ie. **What does the Client see?** Please indicate what you think your actual score is and what you think a desirable score should be.

1. 0-10% 2. Up to 20%, 3. Up to 30% 4. Up to 40% 5. Up to 50%
 6. Up to 60% 7. Up to 70% 8. Up to 80% 9. Up to 90% 10. Up to 100%

Opportunity Factors (client selling opportunities)		1-10		Utility Factors (ease of doing business)		1-10	
		Actual	Desired			Actual	Desired
1. We know the client's budget.				1. Quotations or proposals reflect and apply to client's situation.			
2. We know how the client uses the application and their knowledge level				2. We produce timely turnaround of orders and client requests.			
3. We know what volume is expected.				3. We deliver right the first time.			
4. We know our competitors and where we stack up. We rate where we stand with each opportunity before we embark on an expensive sales and proposal effort.				4. We're knowledgeable at the time of the order of potential difficulties, resource shortages or service supply difficulties and manage client expectations accordingly.			
5. We know the client's targeted price range &/or price sensitivity on each opportunity.				5. We call Client on difficulties and work out solution before the delivery.			
6. We know when the client's plans to buy.				6. Our prices are competitive and reflect value in the client's eye.			
7. We know the reasons client would shift suppliers or choose differently				7. Special orders and/or requests are handled right.			
8. We know the key buying influences and have tactics to "touch" them and stay in touch with "changes"				8. Quotations or proposals are turned around within agreed upon time (depending on complexity).			
9. We know each buying influence's commercial, professional and personal reasons for buying.				9. Operations are responsive to quotations, orders and client requests and questions.			
10. We secure the client's commitment to next steps and the process is reciprocal to ours—they invest time & cooperate in the sale.				10. Operations buys-in and "owns" delivering what "sales" has sold. Teamwork exists.			
Total Opportunity Score				Total Utility Score			
Total of the Opportunity and Utility Actual and Desired Scores							
Plot total scores on vertical axis on page 4							

INSTRUCTIONS: Individually take 5 minutes to look at your Client profile of how well you manage your business relationships and how well you plan your account strategies. On a scale of 1-10, how well does our organization or firm meet the following factors ie. **What does the Client see?** Please indicate what you think your actual score is and what you think a desirable score should be.

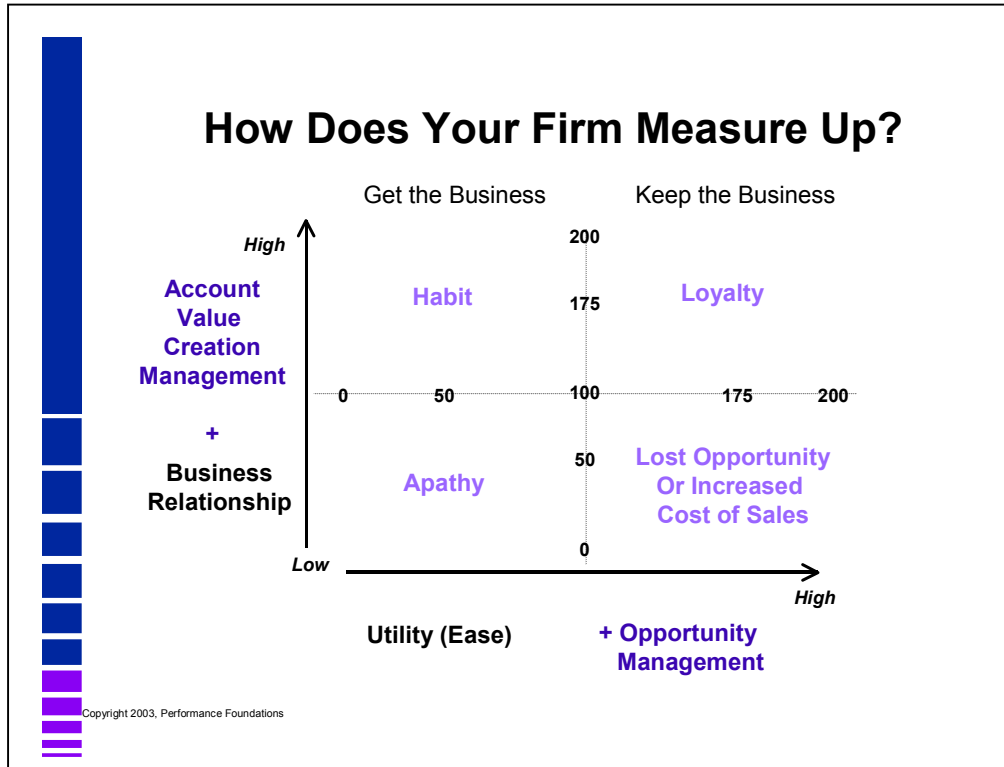
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Account Planning Factors		1-10		Business Relationship Factors		1-10	
(advance plans for accounts)		Actual Desired		(actual dealings with account)		Actual Desired	
1.	We have methods to classify our best buyers and accounts.			1.	Client calls us first before s/he calls other vendors.		
2.	We have plans to further develop or maintain our best accounts.			2.	We make the Client look good.		
3.	We have planned <i>business</i> reasons for staying in touch with our accounts that include listening for new needs.			3.	We save the Client time, money, headaches and/or avoid the risk of buying the wrong service solution.		
4.	We have indirect methods of staying in touch such as articles, trade associations, civic associations that keep us in contact.			4.	Client openly and candidly discusses business plans and/or significant happenings that affect our business with them.		
5.	On important accounts we have entertainment or education plans.			5.	Client candidly shares concerns that affect our business with them.		
6.	We have methods to know where we really stand with the client and use them to gauge our value to them.			6.	Client works with us on supply problems rather than call a competitor.		
7.	We have internal review methods to monitor factors that relate specifically to our clients and prospects.			7.	Client shares with us new needs they have and asks our opinion.		
8.	We look for new ways to create client value we systematically use.			8.	Client accepts our solution.		
9.	Our company has active plans for offering new products and services.			9.	Client tries new solutions we suggest.		
10.	Sales develops and tests questions that pertain to new product/service offerings so we can identify buyer's needs, opinions and issues and fine tune our approach.			10.	Client includes us in company meetings that pertain to our services.		
Total Account Plan Score				Total Relationship Score			
Total of the Account Plan and Relationship Scores Actual and Desired				Total of the Account Plan and Relationship Scores Actual and Desired			
Plot on horizontal axis on page							

INSTRUCTIONS:

Plot your total score from page 2 on the vertical axis using one color for actual and another for desired.

Using your total score from page 3, plot on the horizontal axis using one color for actual and another for desired.



Where do your actual scores intersect? Your desired scores?

Is there a large gap between actual and desired?

If this is a worthwhile account, how might you improve your business with them or how might you improve your overall business development effort?

Janice Scanlan helps firms improve their marketing to sales and sales to service efforts. If you need to win more business, contact Janice at 281 261-2320.