Developing better client interactions

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The Model:

		Client perspective	
		In focus	**Not in focus**
Your perspective	**In focus**	**The matter in hand** The project The service The engagement	**The client's world** The challenges and issues facing the business and/or the individual
	Not in focus	**Your full capability** The full service offer Where we can help Where we excel Our stories	**True value creation** New solutions Proactive projects

This is a simple, but effective, model which provides a framework to build more effective client conversations. It helps with planning in advance of interactions and acts as a visual map to 'move' conversations to the points of highest value.

Overview:

The model works in a similar way to Johari's window showing how the interaction is approached from both your and the clients perspective.

Starting in the top left box the usual main focus of conversations between professional and client is the matter in hand, the piece of work that the professional has been engaged to carry out on behalf of the client. This may be compliance, consulting work or a specialist project. The conversation could be a planning meeting, an update conversation or a post completion review, but it is narrow in scope and is essentially focused on that piece of work.

From our work with professionals, we believe that this box is where the vast majority of client interactions could be placed. The client expects to talk about the matter and the professional is comfortable talking about the matter as it is in their sphere of specialism. If the work is done to a good standard the client is probably happy with the service level from the professional (in respect of that particular service).

Yet there is so much scope to learn, to change the perception of what the professional (and their firm) can offer in the eyes of the client. The aim is to move the conversation into the top right box.

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This is the real 'stuff' which is prominent in the clients head, but is rarely in focus. The challenges, issues, pressures that they are facing in the context of their businesses or lives. Their ambitions, plans and values – how they see the world. By asking good quality questions covering the clients market, environmental, strategy, sales, marketing, people, financial, operational and personal challenges then this starts to change the dynamics of the interaction.

The professional learns so much more and maybe starts to identify opportunities to help. The client starts to change their perception of the professional away from specific service provider towards a more valuable resource.

There could then be a real opportunity to move to the bottom left box. To articulate how the professional or others in the firm could provide guidance and solutions to their challenges, to provide support and services to take the pressure away, to help them plot a realistic path to realise their ambitions. It could be a chance to tell stories of how the firm has worked and helped similar organisations or individuals or work through case studies. It could be an opportunity to talk about who you could introduce from your network who may be able to add real value.

We have spoken to so many clients of Professional Services Firms who are amazed when we list out the full service offering of the firm and reveal that most of them have never been introduced into conversation. Great client solutions have been left **out of focus**, often for years, usually because the top right box stage has been skipped.

The final box, on the bottom right is about value creation. By building far better client interactions with the professional learning more about the world of the client, thinking more about solutions and opportunities to solve problems and with the client more aware of the value proposition synergies can develop. This may be the development of bespoke solutions or new services and products, it could be helping clients identify challenges and opportunities before they are on the horizon. What it will be is a solid, trust based relationship which is creating mutual value.

How the model can be used?

When planning a client interaction
The model helps to design the framework for an effective interaction. After the talk about the matter in hand, what questions can be asked to LEARN more about the client / the business, their current plans, current challenges and opportunities. What can the professional tell about current relevant solutions firm wide, about some recent success stories about how the firm can help?

We advise professionals to 'put themselves in the clients shoes' in advance of the interaction. What could be their situation, how could they be feeling right now? Clearly the professional should never guess or assume, but this helps in putting together several great questions to ask and thinking about relevant ways the firm could support them.

To use as a guide during the interaction
Having the model in mind helps to focus thinking and action with the clear outcomes of learning, building relationships and identifying opportunities to create mutual value.

To record key information
Every client interaction is an opportunity to build and strengthen the relationship and build knowledge. Yet often so much knowledge is left in the heads of professionals. This is about Client Relationship Management (CRM). The simple structure of the model can help to record information such as an update on the matter in hand, what is going on in the world of the client, what could this mean for the firm, how can we help?

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To help with 'show and tell' collaboration meetings
As part of CRM and Key Account Management (KAM) we always advise professionals to share and collaborate with colleagues across the firm, to draw on the expertise, insights and knowledge from other service areas. A great way to do this is to run 'show and tell' meetings, where individuals 'bring' client information to a group session, talk through the essentials of the client situation and ask for input on questions to ask to build missing knowledge and client service opportunities.