

# Nine ways to ace client reviews

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Effective **Quarterly Business Reviews** can be the determining factor in a client's decision whether to forge a strong, long-term relationship with your company or give you the boot.

Reviews take time and effort – on both sides. Research shows the average in-person client review costs over £2,000 per attendee. So, for all parties' sakes, they're worth doing right. Yet, while there's no magic formula to winning clients' hearts and minds, there are nine steps you can take to prepare for the best possible outcome. **Let's take a look.**

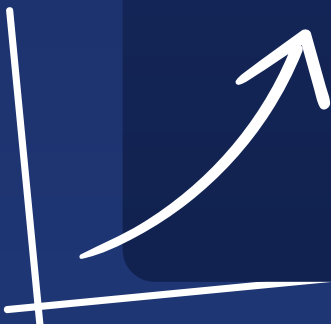
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## Know your goal

What makes a good Quarterly Business Review? First, you need a clear framework. This means making sure you're aware of both sides' expectations.

As the supplier, what outcome do you want to achieve? A pat on the back for the things you've done well? To sell in more services and grow the relationship? Are you hoping to use the time to collect outstanding debt?

How does your goal reflect your client's expectations? Get into their mindset. There's no point in going in, all guns blazing, trying to wow them with your latest innovations if you've not met your KPIs and they want to use the review as an opportunity to vent.



## 2

# Have a clear plan of action

How are you going to achieve your goal? Many reviews fail because the supplier doesn't have a clear plan of action – they just see it as an opportunity to share data, have a chat and showcase a bit of innovation at the end. It's not.

Being well-prepared is the foundation for building your client's trust and commanding their respect. Create a step-by-step list of what needs to be discussed and make it clear who's covering each point on the agenda – then stick to this during the review.

Establishing ground rules for the meeting and outlining expected behaviours from everyone in your team will ensure things run as smoothly as possible. You want to present a united front.



# 3

## Always over-deliver

Can you offer ways that will make life simpler, easier or better for your client? Can you provide solutions to issues outside your existing remit?

They've already invested in onboarding your company, so you're in the perfect position to sell in more services.

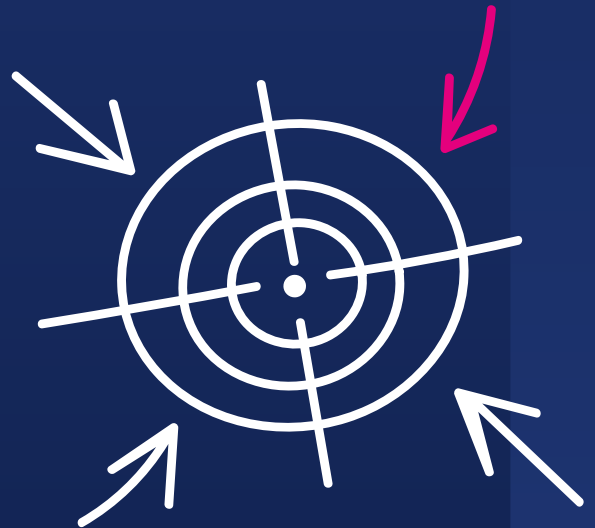
Highlight opportunities for growth and expansion. Present latest trends, patterns in behaviour and measurable results. Incorporating this type of approach into the agenda shows focus and long-term engagement, allowing for a positive, progressive working relationship. It's also the best way to stand apart from your competitors.



# 4

## Don't risk being wrong

Sharing incorrect facts, stats, trends or data in a review is inexcusable. Don't risk being wrong – check everything's correct, then check again – because that's what you'll be remembered for.

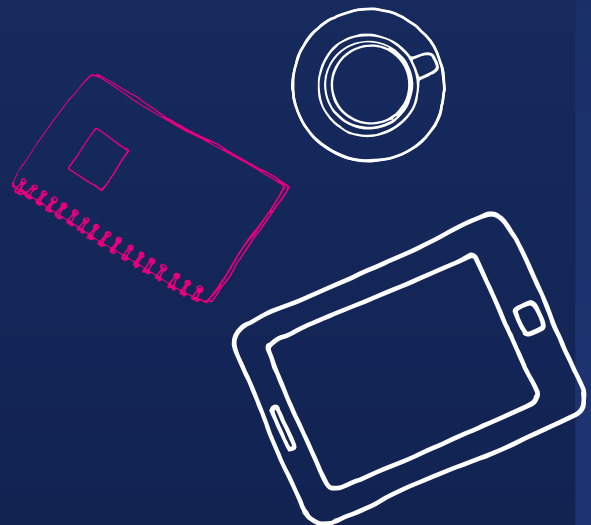
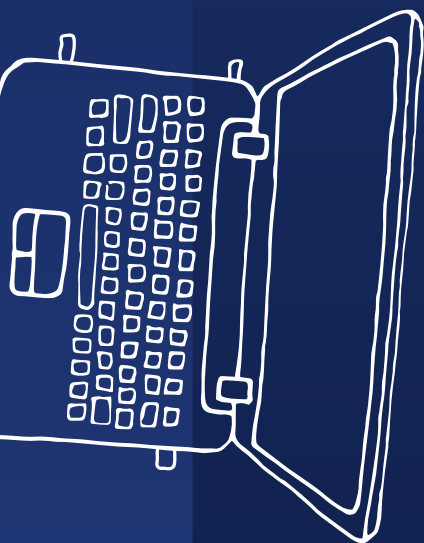


# 5

## Get the right people into the room

Who should attend the review? First, find out who's coming from the client's side. Then, mirror their numbers and seniority as closely as possible.

If there are three of them, you don't want to send ten. Likewise, their leadership team won't feel valued if they find themselves sitting opposite your junior vendor manager.



# 6

## Make sure everyone turns up

Making sure your team turns up is easy; getting your clients to commit is harder.

Send them constant, simple reminders in the lead-up to the review: 2 weeks in advance, 1 week in advance, the day before. Say you're looking forward to seeing them, check they're going to attend, and excite them about the things you'll be discussing on the day.

Manage their expectations by sharing your agenda and letting them know what they can expect to have achieved by the end of the session.

This all helps ensure emotional buy-in and means they'll be less likely to cancel at the last minute.



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## **Complete any outstanding actions in advance**

Check all actions from the previous review have been covered off in advance. If there's anything outstanding, address it now.

A Quarterly Business Review isn't an opportunity to go over old ground – it's a waste of time for all parties, and incredibly frustrating for the client.



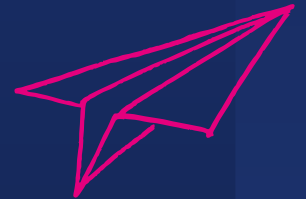


# 8

## Get your tech right

No matter how you're delivering the review – in person or online – you must get your tech right.

Spending 10 minutes trying to work out how to connect your screen or installing the latest software is never going to win any supporters.



## Give yourself a fighting advantage – go online

There's a psychological advantage to holding a business review on 'home ground'. But, as the supplier, it's usually beholden on you to do the travelling – which means you're at a disadvantage from the start, in addition to a potentially significant financial outlay.

So, why not level the playing field by meeting online instead? By partnering with the right technology provider, you can make your reviews slicker, more focused and better quality than ever before – saving time and effort for everyone involved.



# Introducing Clientshare Pulse

**Clientshare Pulse** is a business review workflow tool that enables you to deliver quality reviews to every client, consistently. It allows you to track and manage reviews in real time, get feedback from clients directly, and gives your leadership team one dashboard that enables them to see – at a glance – what's happening across every account.

With tangible benefits for supplier leaders, account managers and end clients alike, isn't it time you discovered a better approach to delivering Quarterly Business Reviews?

**Find out more**

