Building a Trust-Based, Customer-Focused Culture

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The global sales manager at a Fortune 100 technology company describes having two strategies; one is to be customer-centric--the other, to gain a greater share of customer wallet. His counterpart at another major tech company speaks of sales as “the fine art of separating the customer from his money.”

What’s wrong with any of this?

Customer focus and share of wallet
Quarterly quotas
The fine art of….
Being the fox in the customer…
All these are enemies of customer focus, well-meaning, but obscenities
Acid tests refere competitor, and refuse a price cut request
Trust is personal, not just a rational
Custom focus is psychological
Therefore customer focus and trust can’t be based just on proceseses,
Gotta also be beased on mindsets
Some samplings of tipoffs, how to know when you haven’t got it
3 core beliefs you gotta hold

Two Things You Need to Know

How the relationship is going is something most firms would like even more—but don’t know how to ask. The value of that discussion is huge—identifying new issues, surfacing unspoken concerns—even business development. And the value lies in the discussion, not the answer.

Two pitfalls arise. The first is the wrong tool for the job--applying a “how’s the work going” tool to relationships. The second pitfall is borrowing techniques from general industry, rather than using approaches unique to professional services.

The Right Tool for the Job

"How the work is going" can refer to the project, or to the performance of the individuals on the project. Structured, regular project review meetings are invaluable for the former. But not when it comes to course-correcting people.

Client surveys are very ineffective at evaluating personal performance, for a great number of reasons. Clients hate to give negative feedback about professionals, so any feedback is suspect. By the time the survey is done, the opportunity to fix things is usually past. And professionals tend to take feedback very badly, challenging the validity of the data or blaming the sources.

For performance reviews, there is no substitute for an ethic, a process, an attitude of ongoing, direct interaction with the client. Problems must be surfaced all the time and fixed on the spot. Performance evaluation is primarily the responsibility of the professional firm—not of your clients. Don't lay your problems off on them.

On the other hand, "how's the relationship going" is a question that demands client interaction, yet requires a lot of sensitivity. When it comes to the relationship question, it's the discussion that counts, not the answer.

That means you should not contract out the discussion to a third party. Objectivity here is not the point—in fact, subjectivity is. You can't send someone else to discuss your relationships, as Miles Standish found out to his chagrin centuries ago.

Assessing Performance in Professional Services

How often do you fill out service assessment cards in your hotel rooms? Probably not very often. And that may be OK for the hotel business; they have large numbers to draw from, and can describe their service attributes successfully in terms of a few multiple-choice questions. That is not, however, a good model to follow for professional services clients.

To engage clients in relationship discussions, you need personal one-on-one interviews between senior people, with open-ended questions. Conversations should go where the client dictates, not where a prepared interview guide dictates.

Because they are relationship discussions, they should not be done after each project or engagement. Some firms may find them appropriate on an annual basis, but in many cases that can seem too mechanical and cyclical—some combination of every 18-24 months and "as needed" may be a better rule.

The person in charge of the relationship should be at the heart of the discussion, not excluded from it; remember, the point is not to get data but to re-examine relationships. However, it is very useful if he or she is joined by an equally senior or more senior person not involved in the relationship. That ensures two sets of ears to hear what is said, and an opportunity for intra-firm mentoring and candid discussion, as well as another ear for the client. For smaller firms, this is a key CEO task.

Setting up client relationship review meetings is easier than many professionals fear. Once it is understood that your focus is not a report card or a source for performance review feedback, but rather an honest discussion about how to work together going forward, most clients are more than willing to devote time.

One firm found it useful to send out in advance a very high level set of "how are we doing" questions. In most cases, the client appreciated the questions, but dispensed with them quickly and moved on to the "white space" issues foremost on his mind. In that sense, very brief high level "survey-" type questions have a role—to give each party a good "excuse" to talk about the really big issues—how the relationship is going.

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