

The rchard

An Expert's Guide to Working with Clients

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Know thyself?

- What is your company DNA or Culture
- Where is your business willing to go?
- What kind of clients do you want?
- What lines do you need to draw?
- Why and how do you run your consultancy?

Your Client Knows What They Want

- Engage the customer through active listening. Take notes.
- Set goals for immediate needs, create a wish list for future needs.
- Evaluate: Hardware, financial, emotional needs.
- Know your boundaries and stay within policies
- Be sensitive. They may know “what” they want, but you will help them with the how.

Curate the Customer Relationship

- Your a partner, not a parent
- Create a cooperative ecosystem not just a co-dependent relationship. Help them help themselves.
- Keep animosity out of the conversation. Don't project your stress on to there problem.
- Be approachable but dictate how you are available

How to Write Proposals Effectively

- Listen, Learn, Resolve
- Be realistic with needs and time
- Reality check with details
- Define time limits
- Set expectations

Communicating Rates and Rules

- Cost Vs Value
- Protocols: Good Workflows will create good client relationships
- Expectations: It goes both ways.
- Rates: Clearly define how and what you bill for.

Monitize

- Your time for their money
- Your Invoice: It is a receipt. You are just getting reimbursed.
- Keep rework to a minimum so you can keep profits at a maximum.
- *Collect onsite or at a set period weekly.
The value of what you did fades hours after your done

Setting Realistic Goals and Limits

- Listen to the need and guide the conversation
- Stay on target
- Use your insights and experience.
- Align perceptions with reality

Discuss Security

- Evaluate password policies, and help create if needed.
- Mobile Device Management
- Certificates
- Full Disk Encryption

Cultivate a Proactive Environment

- Can address unspoken needs
- Can lead to additional revenue stream
- Can avoid potential disasters
- Can show you care about them and not just the fix.

Communicating in Real-Time

- Problems. be ahead of the cure not behind.
- “One more thing...”
- Deflect add-ons. Stay focused on the task.
- Kindly correct bad information.

Speaking tech and Human

- Avoid using Jargon.
- How you talk to clients matters
- Your communication can make or break the relationship.
- Avoid bragging or trying to impress.

It's not you, it's me

- Don't quit. It says more about you than them.
- Finish the project, time up loose ends and hand off.
- Be willing to understand where you made mistakes.
- Sometimes you have to fire the client.

Documentation for Customer

- Document, Document, Document
- Notes on Customer environment
- Notes for techs to use for future
- Notes that make are included for customer
- Review for accuracy

Customer Care

- Follow Up: It's mutually beneficial
- Create a system: 24 Hours, 7 Days, 3 Months, etc..
- It shows you are invested.
- They will appreciate it and this paves the way for a long term relationship.