DELIGHTING THE CLIENT

Building Client Loyalty
- the small things

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Ideas about best practices

• The CLIENT IS ALWAYS RIGHT!

• Focus of top 50 innovators in the world
  1) Innovation as a priority
     ➢ No 1: 22%
     ➢ In top 3: 79%
  2) Science & technology
Ideas about best practices

• Your ideal client

  1) Fundamental principle:
     ➢ “Understanding our clients and their needs”

  2) Convertibility to sales

  3) Retain the right clients
     ➢ Repel the wrong clients
Small details

• Fundamental principle:
  ➢ “Understand your client and their needs”
  ➢ Innovation!
  1) Little improvements
  2) Continuously
  3) For the benefit of your client
  4) Speedy turnaround
  5) Professionalism – trust & credibility
Small details

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Different types of clients

• Client segmentation
  ➢ Traditional v Modern

• Categorise last 20 clients
  ➢ 3 or 4 groups
  ➢ What were their triggers?

• Client personas
  ➢ Most important for you!
  ➢ Survey 5 – 7 clients
Different types of clients

• Build your client personas
  1) Fictional representations
  2) Real data about client demographics
  3) Educated speculation

• How are personas created?
  1) Research
  2) Mix of clients
  3) What do they value
  4) How do you fit?
Different types of individual

- Know who you are dealing with

  ➢ Personality types and differences

  1) **DISC**
     - Dominant
     - Inspiring
     - Supportive
     - Cautious

  2) **Myers Briggs**
     - Analysts
     - Diplomats
     - Sentinels
     - Explorers

  ➢ Generational types and differences

     - Builders, Boomers, X, Y, Z (Millennials = Y/Z)
Different types of individual

THE GENERATIONS IN THE WORKPLACE

Based on a survey of 1,200 workers across different generations measuring their strengths & weaknesses

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Baby Boomers</th>
<th>Gen X</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pros:</td>
<td>Productive, hardworking, team players, mentors</td>
<td>Managerial skills, revenue generation, problem solving</td>
<td>Enthusiastic, tech-savvy, entrepreneurial, opportunistic</td>
</tr>
<tr>
<td>Cons:</td>
<td>Less adaptable, less collaborative</td>
<td>Less cost-effective, less executive presence</td>
<td>Lazy, unproductive, self-obsessed</td>
</tr>
</tbody>
</table>

EXECUTIVE PRESENCE
- Baby Boomers: 66% (Pros: Productive, hardworking, team players, mentors)
- Gen X: 32% (Cons: Less adaptable, less collaborative)
- Millennials: 10% (Cons: Less cost-effective, less executive presence)

TECH SAVVINESS
- Baby Boomers: 78% (Pros: Productive, hardworking, team players, mentors)
- Gen X: 34% (Cons: Less adaptable, less collaborative)
- Millennials: 20% (Cons: Less cost-effective, less executive presence)

GENERATING REVENUE
- Baby Boomers: 66% (Pros: Productive, hardworking, team players, mentors)
- Gen X: 32% (Cons: Less adaptable, less collaborative)
- Millennials: 10% (Cons: Less cost-effective, less executive presence)

ADAPTABILITY
- Baby Boomers: 66% (Pros: Productive, hardworking, team players, mentors)
- Gen X: 32% (Cons: Less adaptable, less collaborative)
- Millennials: 10% (Cons: Less cost-effective, less executive presence)

COST-EFFECTIVENESS
- Baby Boomers: 59% (Pros: Productive, hardworking, team players, mentors)
- Gen X: 34% (Cons: Less adaptable, less collaborative)
- Millennials: 20% (Cons: Less cost-effective, less executive presence)
Building respect and trust

• Building & cultivating long term relationships
  ➢ Don’t presume loyalty
  ➢ “Bad customers are lost because of price; and good ones, because of bad service”
  ➢ Deliver on promises, otherwise don’t promise
  ➢ Customers expect clarity, simplicity and solutions – not excuses
  ➢ Creating memorable experiences
  ➢ Small, unexpected things that surprise = WOW!
  ➢ You are the greatest difference!!
Building respect and trust

- Building & cultivating long term relationships
  - Resisting commoditisation & standardisation
    - Antidote: Differentiation
    - If its price, you have a problem!
  - Innovation creates differentiation
  - Technology makes a difference
  - Get to know the individual, not just the client
  - The small things!
Handling exploitation

• Interpersonal management skills
  1) Clarifying and confirming
  2) Constructive criticism
  3) Discussion skills
  4) Managing differences
  5) Crediting

• Emotional intelligence
  1) Self-awareness
  2) Self-regulation
  3) Motivation
  4) Empathy
  5) Social skills
The Future

• Disruption levelling the playing field
• Redefining the client experience
  ➢ Digital & personal
  ➢ Innovation hubs v offices
  ➢ Distributed virtual presence
  ➢ Leveraging working from home
  ➢ Artificial intelligence & block chain
  ➢ Reformation of the IP system
• The impact of Millennials
Thank you

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