



A checklist to benchmark your business development process

You are a successful professional services organisation and have a proven track record. Why then, would you question your client management?

Maybe your client has started to suffer from 'consultant fatigue' having undertaken numerous consultancy projects over the last year and now feels that using more consultants will lead them to be criticised for their management of resources?

Perhaps this sounds familiar to you: Your client has decided to postpone the next phase of a proposal and there are the usual excuses for the postponement - they now plan to go out to tender, next year the budget will not be there, there is no rush. The problem for you is that, if they delay, you know your client will struggle to get continuity of consultants.

Should this sound familiar to you, what practical steps could you take to stop this standstill and get the best outcome?

The following sets of questions have been designed to help you benchmark your current practices, processes and procedures of client management against best practice. We have placed the questions into six distinct stages of the business development process:



1. Planning - linking client management tactics to your strategy	Answer
1. How well do you translate revenue targets into attainable account plans and plans for target client organisations?	
2. How do you determine accountability for existing and target client relationships? (Do you call this 'account management' or 'client relationship management'? Have you considered the impact of this vocabulary on your clients?) How important is chemistry of relationships compared to seniority in these decisions?	
3. How do you create career progression for effective sales people without damaging relationships?	
4. Do you plan to involve the service deliverers and support teams so they can help you to identify and anticipate potential needs early on in your selling process?	
5. What sales training do you provide for your technical service deliverers? What technical (consulting) skills do you provide to your salespeople? Do you ever train these two groups together?	
6. How do you plan to coordinate the efforts of both your salespeople and specialist consultants in the bid process? How do you determine and subsequently reward success?	
7. How often do you review progress against plans? What steps do you take when sales are ahead or behind budget? How do you manage your cost of sales?	
8. How do you review the progression of leads through your sales funnel? What do you do to anticipate your forward order book? How do you manage the risks associated with utilisation feast or famine?	

PSYCHOLOGICAL SKILLS

for PROFESSIONAL SERVICES Ltd

2. Initiating - building the relationship that will lead to business	Answer
<p>1. Do you know which marketing tactics produce the best leads? What metrics and learning processes have you developed to sharpen your lead generation strategies year on year?</p>	
<p>2. What steps do you take to qualify the opportunity as good business for your organisation – or too high risk?</p>	
<p>3. How do you determine the client’s objectives and their primary challenges and/or opportunities? How do you make sure that there is a fit with the overall strategy of the client organisation?</p>	
<p>4. What steps do you take to scope the prospective client’s needs so that both you and the client have an agreed view of the territory to be covered and the matters to be addressed? What techniques do you use for reconciling client views with your own or differing views within the client organisation?</p>	
<p>5. Do you know the key differentiators in the professional service/client relationship compared with the product/service customer relationship? How do you make certain that you will be perceived in the former (higher value) of these two categories? What behaviours are essential to establishing this kind of professional relationship?</p>	
<p>6. Have you determined how will you differentiate the relationship you can offer the client from that of your competitors?</p>	
<p>7. How do you proactively engage your client’s interest while also substantiating the quality of your service?</p>	

<p>8. To what extent do you think about a client's business solutions rather than technology solutions or the product sales targets you have to meet?</p>	
<p>9. When should you start serving, rather than selling? How do you demonstrate that your people will be credible as well as great to work with?</p>	
<p>10. How do you establish common 'ground rules' with clients that allow them to manage you effectively and create joint accountability for the project's success? Have you outlined appropriate ways to establish your commitment?</p>	
<p>11. How do you stay responsive and yet avoid just 'giving services and consulting away'?</p>	
<p>12. How do you disengage yourself and your organisation from working with dubious client organisations? (How do you even determine they are dubious?)</p>	

PSYCHOLOGICAL SKILLS

for PROFESSIONAL SERVICES Ltd

3. Committing - achieving the first sale	Answer
1. To achieve the sale of a professional services assignment, what key aspects do you have to satisfy?	
2. Do you know what process to use to identify (and then manage) the logical, emotional and political elements in an often complex decision-making process?	
3. What is your strategy for handling competitive bids?	
4. How do you present your credentials as the right provider when your experience is limited (especially in a situation where everybody is in the dark)? How do you reassure clients about your objectivity?	
5. Do you know the best way to price professional services? How do you present your price so that it will be seen as good value? What might be the implications of revealing your daily rates? Can you avoid this scenario?	
6. How do you prove that you can do the work without giving the details of the process away to the client or other competitors?	
7. How do you plan to lower the cost of sales, year on year?	

PSYCHOLOGICAL SKILLS

for PROFESSIONAL SERVICES Ltd

4. Delivery - managing perceptions of quality and value	Answer
1. During the delivery stage of the project, who actively manages the relationships? How are these efforts coordinated?	
2. What tactics do you employ to make sure that your clients will be delighted with the quality of your consultants and the outcomes they produce?	
3. During the engagement how do you and the clients measure progress and achievement?	
4. What processes have you put in place to deal with complaints?	
5. Should you need to rotate your consulting staff, how do you do this without irritating the client?	
6. Which parts of client handling are truly seen as valuable by your clients? (And conversely, frankly which are seen as irritating? How do you know?)	

PSYCHOLOGICAL SKILLS

for PROFESSIONAL SERVICES Ltd

5. Expanding - growing the business within the client company	Answer
<p>1. What steps do you plan to take to grow the business within client organisations? (How does this link to your project management process, service line strategy and overall account planning?)</p>	
<p>2. Who has been determined as responsible for sell-on? Is it, or should it be the same person who is responsible for sell-in? Why (not)?</p>	
<p>3. How much do you do (or should you do) for free as part of the selling-on process?</p>	
<p>4. How do you plan to build relationships in other departments, business units of the client's organisation?</p>	
<p>5. What do you do if you begin to realise that there is no real business future in the relationship with this client?</p>	
<p>6. In the medium term, how do you continue to create value? What do you do about the aforementioned 'consultant fatigue'?</p>	

PSYCHOLOGICAL SKILLS

for PROFESSIONAL SERVICES Ltd

6. Securing loyalty - developing the client over the longer period/keeping out the competition	Answer
1. Once the project is finished, who should manage the relationship? How do you determine how much to spend on this?	
2. What sorts of interventions will clients see as valuable at this stage in the relationship?	
3. How far do you take these relationships? Have you determined 'appropriate' boundaries? How do you create long-term professional relationships with clients? How do you produce references and advocates for your organisation?	
4. How many of these relationships do you expect salespeople to manage? What sort of conversion rate should you expect? Do you know if this is reasonable?	
5. What do you do when your client hires other specialist firms? Should you (or are you expected to) introduce other specialists outside the sphere of your organisation's competence? Should you take a percentage for making this introduction?	
6. What steps do you take when you find out that a competitor/gatekeeper is trying to influence your client to look elsewhere for your service?	
7. How should you manage your pricing over a longer period of time/over long projects? Do you offer discounts for volume and is this a good idea? What if your client insists?	