Expand Your Horizons

EASY BD
ON DEMAND

STRIDE ONE

CLIENT EXPERIENCE INSTITUTE

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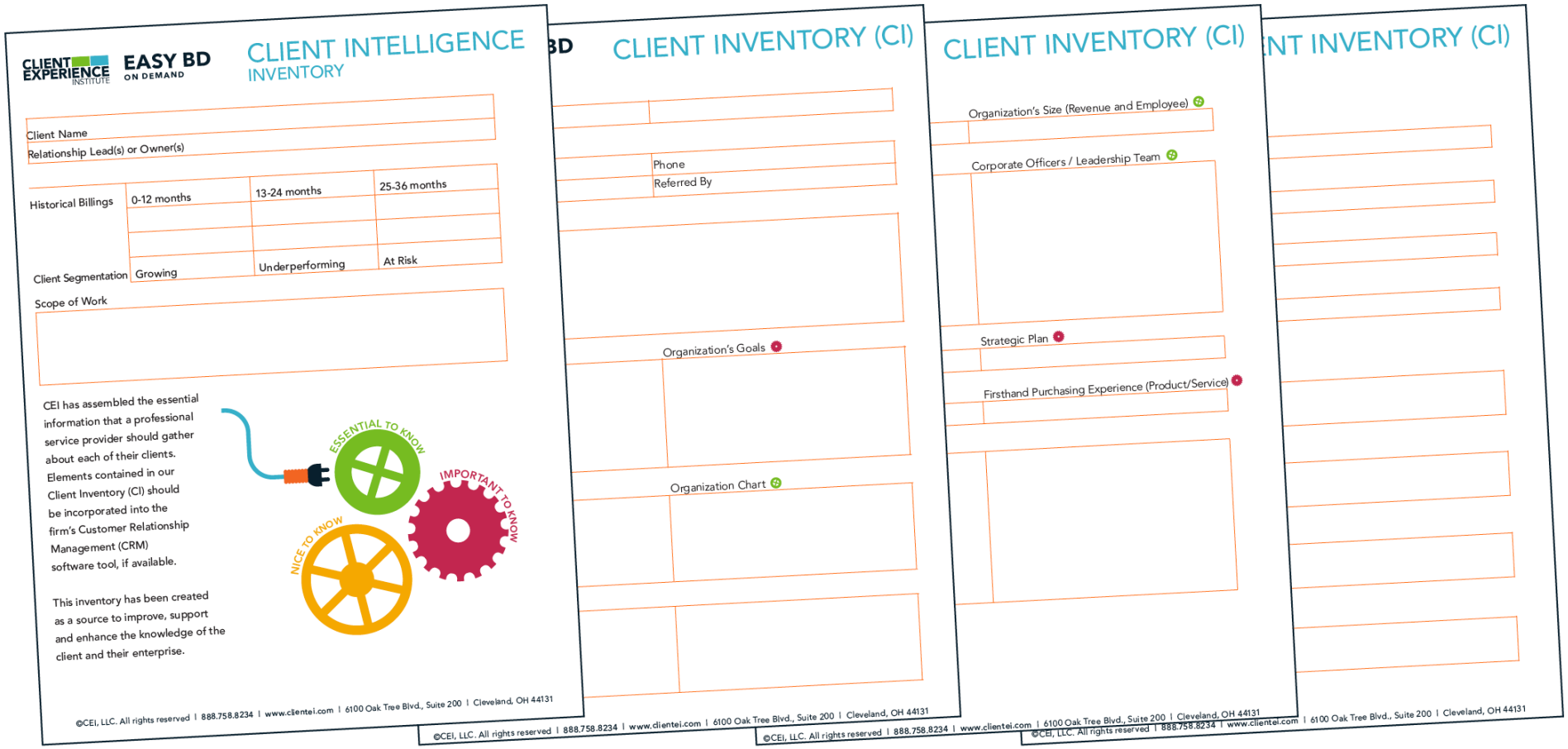
CLIENT INTELLIGENCE
INVENTORY



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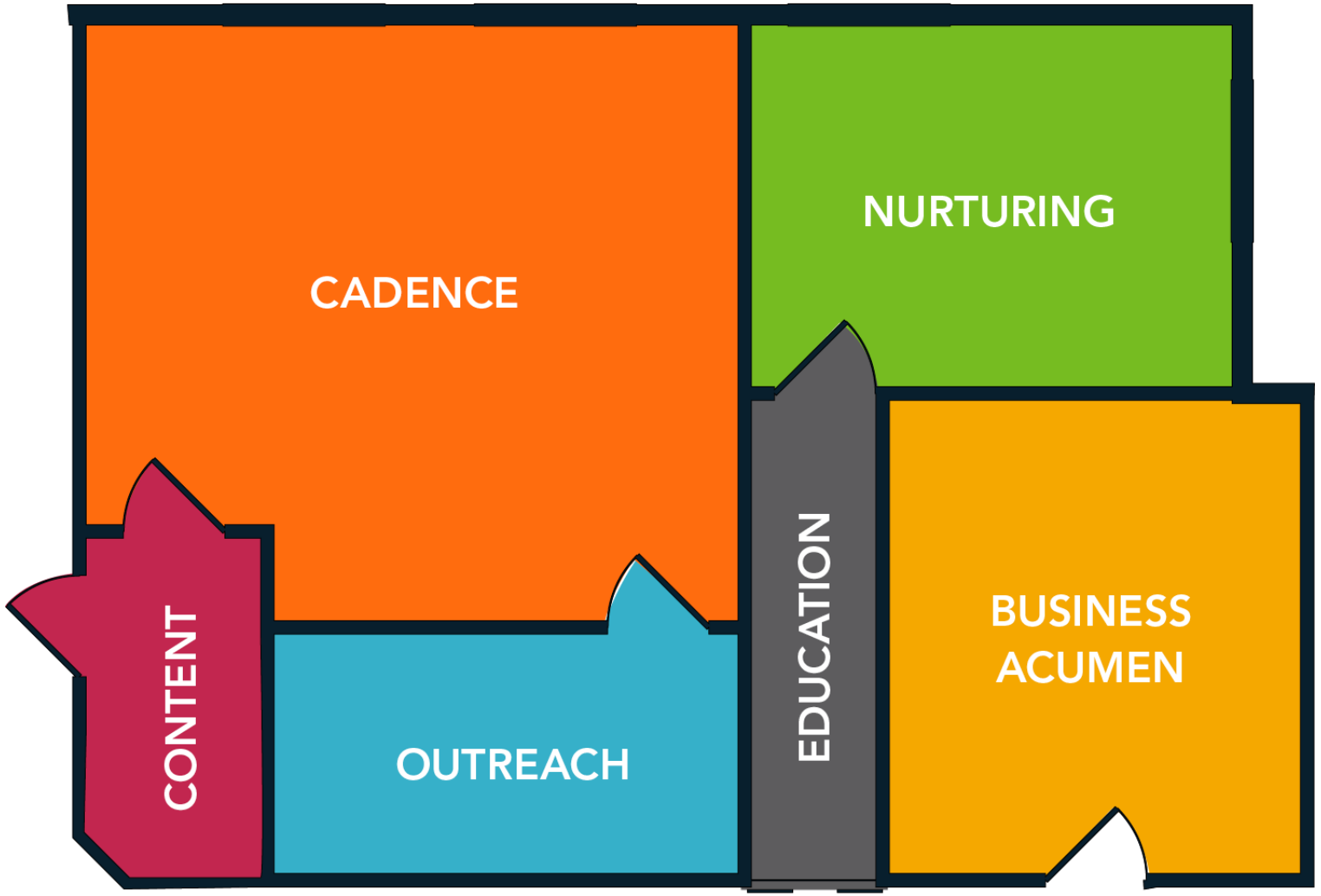
PRINCIPALS OF CLIENT ENGAGEMENT



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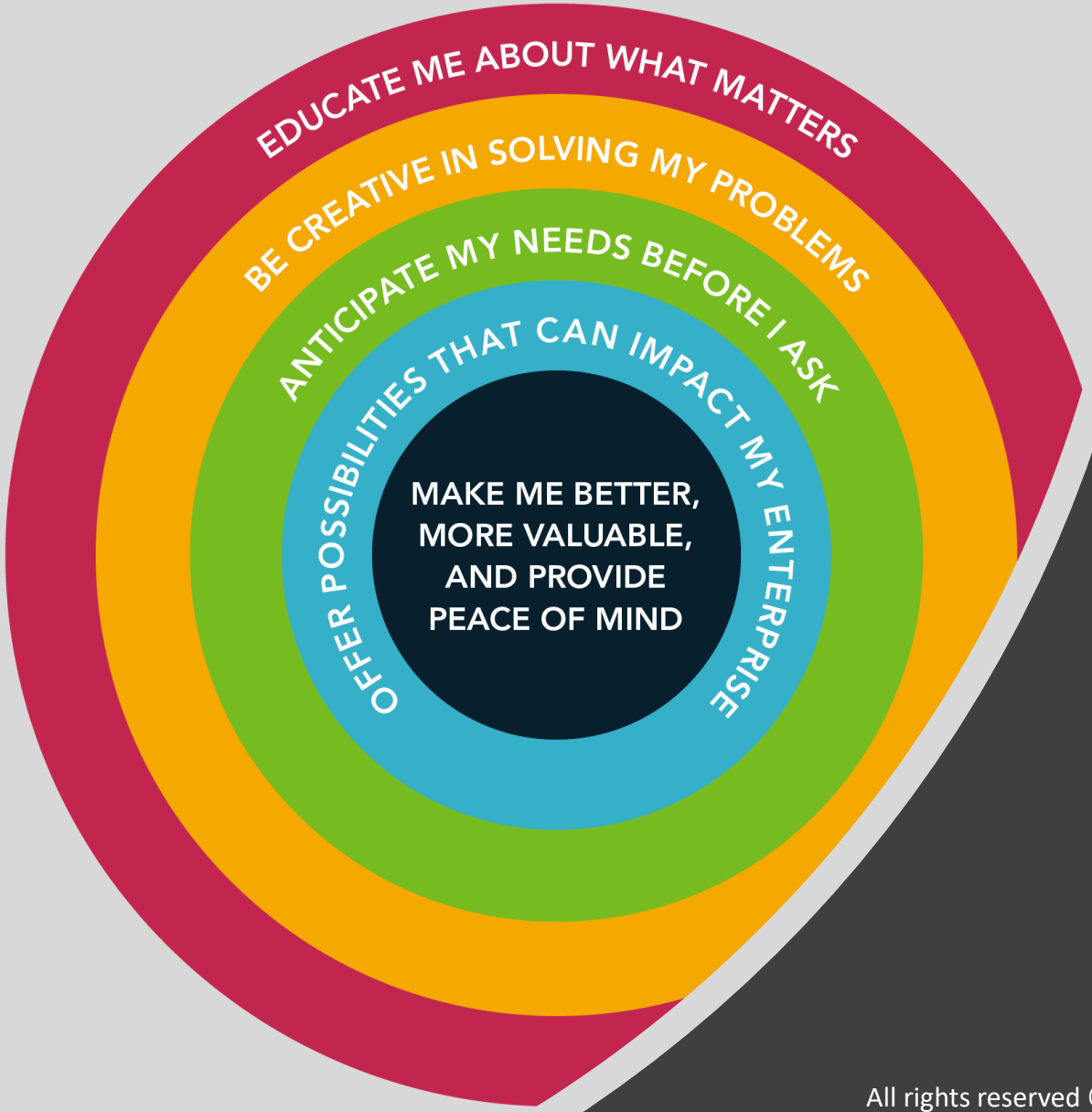

Client First Philosophy

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Ways to Stand Out with Clients

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CLIENT ENGAGEMENT INDEX

Relationship Strength	Revenue	Value Delivered	Quality of Functional Contacts	Satisfaction Level
Indispensable Partner	Significantly Increasing	Transformative: Ease of Doing Business Strategic Impact	Deep Cross Functional C-Suite Connections	Raving Fan
Preferred Provider	Increasing	Impactful: Business Process Improvements Revenue Enhancements	Multiple Management Level Contacts	Advocate
Trusted Advisor	Status Quo	Incremental: Mitigates Risk Optimizes Cost	Strong Functional Relationships	Promoter
Transactional	Decreasing	Status Quo: Serving the current needs	Single Point of Contact	Neutral
At Risk	Significantly Decreasing	Not recognized	Impersonal Relationships	Dissatisfied
No Relationship	Lost Business	No perceived value	No Established Rapport	Silent Discontent

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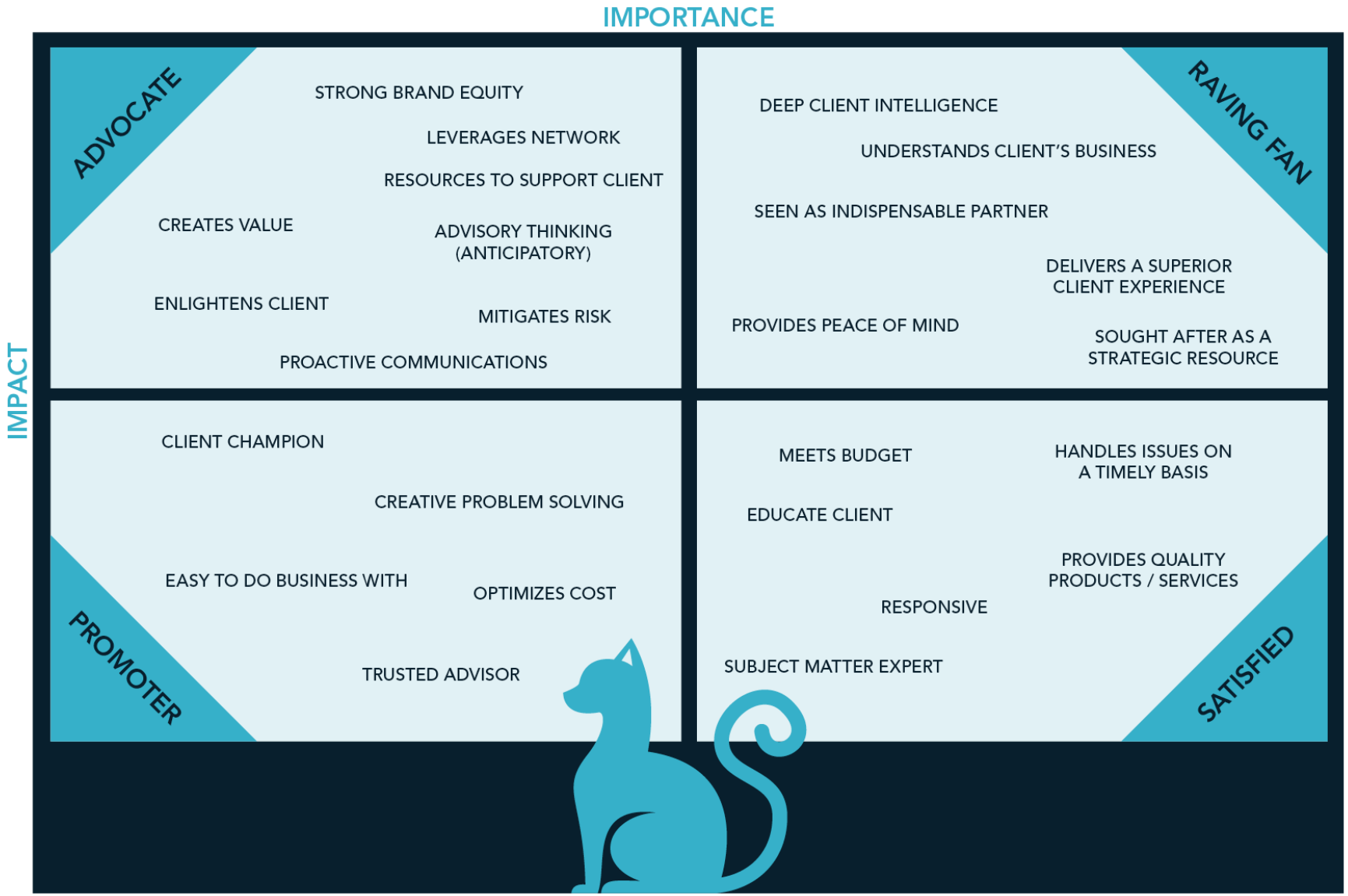
HOW YOUR CLIENT SEES YOU



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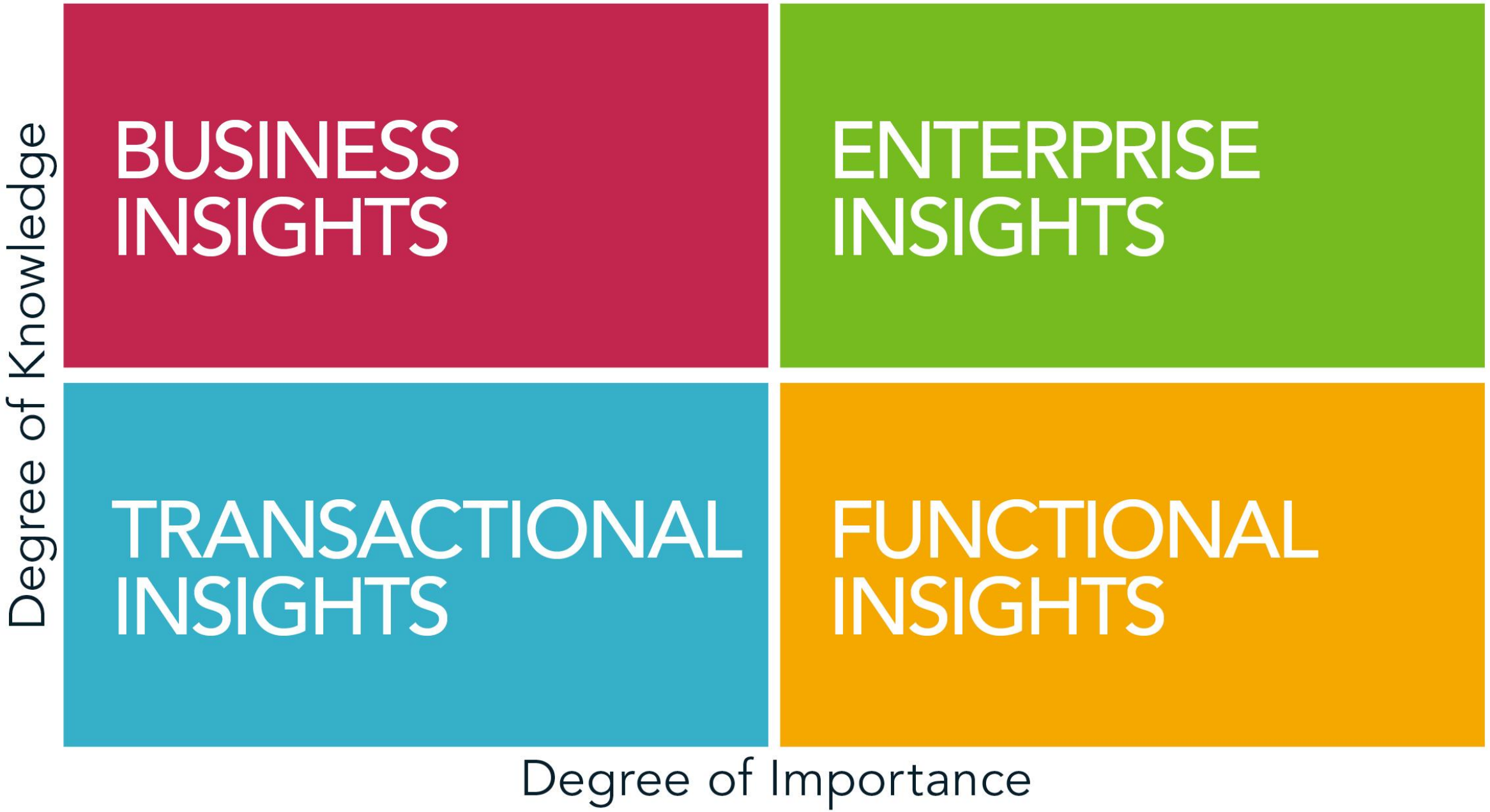

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CLIENT EXPERIENCE INSTITUTE

WHO CARES
ALIGNMENT GRID

CEO/Owner	CFO	COO	VP Marketing	VP Sales	CIO/CTO	IT Manager	HR Director	Field Ops/ Comm Manager
STRATEGIC FOCUS						TACTICAL FOCUS		
Mergers & Acquisitions	Mergers & Acquisitions	Mergers & Acquisitions	Market Research	Revenue	Implementations	Job Justification	Realignment Strategies	Tactical Implementation
Shareholder Value	Shareholders	Branding	Key Deliverable Impact	Op Expenses	Monitoring & Security	Job Security	Benefits	Pricing
Industry Analysts	Industry Analysts	Supply Chain Mgmt	Partnerships & Alliances	Sales Forecasts	Disaster Recovery	Tactical Implementations	Personnel Development	Daily Operations
Profitability	Profitability	Customer Relations	Value Proposition	Profitability	Customer Relations	Daily Ops	HR Policy Socialization	Information Security
Growth	Capital	Vendor/Supplier Mgmt	Product Impact	People Mgmt	Systems	Vendor Control	Training	Government Compliance
Market Share	Financing	Streamlined Ops	Marketing Plan	Market Share	ROI	Preparing for Next Job	Sensitive HR Issues	
Competitive Advantages	Investor Relations	Processes	Package Solutions	Hiring & Training	OpEx vs CapEx	Certification & Training	EEOC	
Financial Results	Budget	Logistics	Road Map	Job Security	Strategic vs Tactical	Pricing	Legal Restrictions	

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CLIENT MAPPING -
UNDERSTANDING THE BROADER ENTERPRISE

STRATEGY	Do you presently have a strategic plan? What are the top initiatives of the enterprise? What are you most concerned about that will impact these desired outcomes?
SALES	What corporate wide initiatives are underway to support the realization of your growth plan? What can our firm provide that could assist you in the development of your sales efforts? From a channel strategy perspective, do you need any assistance with entering new geographies, establishing additional partnerships, or securing new space?
OPERATIONS	What continuous improvement or CAPEX initiatives are underway to drive efficiency and profitability? What inherent risks do you face that require leadership's undivided attention? From a risk management perspective, what concerns do you have?
LEGAL	As you look across the enterprise, what are the most pressing demands being placed upon the legal function from both internal and external stakeholders? Given these demands, when do you look to outside counsel for assistance? How do you select and evaluate these outside advisors?

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CLIENT MAPPING -
UNDERSTANDING THE BROADER ENTERPRISE

TECHNOLOGY	How does innovation contribute to the success of the enterprise? How does technology enhance the overall client experience? What technology disrupters are likely to impact the organization? What CyberSecurity and Data Privacy initiatives are you presently doing or contemplating?
HUMAN CAPITAL	What are the greatest challenges impacting the development of your human capital? What employment related matters are you most concerned about? Can you share any initiatives associated with recruitment or retention where our firm could be of assistance?
FINANCE	Which financial metrics are most important to the enterprise? Which areas within finance are you focusing more time on? What type of risk management strategies are you contemplating or implementing?
GOVERNANCE	What type of boards do you utilize today? Do you have any needs associated with board recruitment, structure or development that our firm can assist with? What other type of governance requirements is the company addressing?

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INSIGHTS FOR ACTION

EASY BD		Sprint #4 – Stride 1 **Inspire Client Engagement**
Week #		**FOCUS 5: PLANNED ADVANCEMENT STEP(S)**
4		Review your Client Intelligence Inventory from Sprint #3 - Stride 1
4		Review the Client Engagement Index and assess the level of engagement
4		Assess how each client sees the relationship (Satisfied, Promoter, Advocate, or Raving Fan)
4		Identify insights you want to pursue with current connections based on what they care about
4		Identify the Client Mapping questions to increase cadence of intentional communications, gain greater insights, and enhance engagement (Monthly, Every 60-days, Quarterly, Bi-Annually)

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