The New Client Meetings – Planned Success Acceleration

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"What did you think about the project?" Matt asks Jennifer. It's the make or break question; the one that drives the chatter and happens right after a new service provider meets with a select few to kick off a project. Jennifer replies, "It was a good meeting. I'm not sure what all of the project steps are, or the final outcome, but I am willing to give it a try. We all should." The seed has been planted, the tone has been set and you're well on your way to a successful project.

New client meetings are about ethical persuasion and influencing behavior to create more value for your client's company, their staff and ultimately families. Accelerating new client success starts before the first meeting. A home run should be defined and one should have an understanding of the strategic use of ethical persuasion techniques. These ultimately create greater client value faster.

"It's the meeting after the meeting that sink new projects," states Mike Green, a former State of Michigan Department of Corrections Supply Chain Transformation Manager. Mike and his teams led one of the most successful Department of Corrections cost reduction projects in the state's history. Saving the DOC tens of millions of dollars, it was the Department's boots-on-the ground that made it happen. And, it all began with successful kick-off meetings.

Have you ever calculated the cost of the people's time sitting in the meeting room? It's costly. The meeting needs to leverage the talent and be value-packed. "During new client meetings it is your job to stay one chapter ahead of your client," reflects one of Michigan's most influential lobbyists, Melissa Yutzey of Kelley Cawthorne, a firm renowned for shaping change.

The most effective way to create real value at an initial meeting is to coach behaviors and interactions that ethically persuade the audience to seek understanding, enliven engagement and work to gain a level of commitment beyond that meeting. "The natural tendency is for people to disbelieve and push back when new ideas are shared," explains Yutzey. The session should encourage participant engagement. The focus is to create discussion, set a plan in action and gain a willingness to understand versus the traditional, one-way proctor delivery.

Today's portable, sound-bite-on-demand, speed-of-thought interactions create a new challenge in the meeting atmosphere. Alexandra Trecha, Peer Advisor at the University of Michigan's Center for Intercultural Studies says "to engage others, one must demonstrate a sincere interest in individuals, not just the participants in general."

This is a technique that is rarely used yet simple to deploy. At the beginning of the meeting ask each attendee to introduce themselves and for their meeting expectations beyond the set agenda. This personalizes, encourages fuller agenda consideration and offers a chance for reflection. Why are we here anyway? If a point does not fit, add it to a parking lot to be addressed post session. Additionally, during the session wrap up, the expectation list can once again be reviewed with a simple question asked, "Did you get what you were looking for?"

Meeting mechanics like an agenda, key stakeholder attendance, room logistics and treats all are necessary, yet they are insufficient. Using "infotainment" (fundamentally sharing information in an entertaining format) meetings are intended to share the information, make decisions and determine next actions. Think graphics, brief dot points, colorful wall charts, posters and crisp, clear single-page handouts supported by electronic files. Eight to ten slides for an hour session should be ample. Remember you want conversation, not comatose.

Shy away from the 20-page deck, laden with dot point paragraphs and printed out in greyscale, where all of the graphics become illegible (hint – select B & W on your printer options, not greyscale). When concepts are introduced, analogies should be given. When improvements are explained, specific examples with outcomes and benefits should be offered. Encourage others to explore their WIFM's— what's in it for me. People remember 10 percent of what they hear. You get to 40 percent retention through discussion. That is a four times the average! Encourage discussion.

Bring your session to a value-add wrap up and conduct an I-Chart Review (see side bar). Chris Osborn, a plus 30-year-old strategist and Vice President of Results at Integrated Strategies says, "The I-Chart Review is a fundamental way to reinforce your sincere interest for the individual while gathering important feedback on the meeting. Each participant shares thoughts on the positive attributes of the meeting while recommending improvements. Incorporating the participants' recommendations goes a long way to drive trust, engagement and commitment."

How do you make an I-Chart? Simply draw an "I" on a flip chart. Label the upper left hand corner as positive (+) and

Let's Excel! – New Client Meeting Best Practicess

- Best Way to Kick Off a New Client Meeting: Ask…
  "What do you expect out of today's work session?"
- Best Way to Keep People Engaged…
  "Make it a discussion versus a lecture"
- Best Way to Wrap Up a Work Session…
  "Do the I-Chart review"

the upper right hand corner as improvement opportunities (IP). Under the bottom line of the "I" record comments. Ask all participants for their feedback; what was positive, what can be improved and any other comments about the meeting. We all engage continuous improvement and the I-Chart is a great way to make it happen. You'll find the positives outweigh the improvements. Bonus: you've loaded up the participants with mutual feedback and positive messaging.

A final, impactful ethical persuasion technique is to ask the attendees, "When someone asks you what you think of the project, what are you going to say?" Encourage discussion and offer the following guidance: be truthful, the reality is this is a new project. It is new to you and to others. You've never lived this before.

If you're intrigued and you see the positive benefit, yet you're not sure how you will get there, then tell them, "It was a good work session. I'm not sure what all of the project steps are, or the final outcome, but I am willing to give it a try. We all should."

Nice job! After all, this is about accelerating success, and success is the only option! — SBAM

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I-Chart Objective

Aim to continue building active participation, sharing participant's perspectives and building support for the go-forward. (Example)

+ Positives About Session	**IP** (Improvement Opportunities, How to Improve Next Time)
• Liked to hear what others had to say • Good information • All were engaged • Had the right people here • Overall, very good session! • Coaching others to get on board	• At times we jumped around • We need donuts in the AM

Comments

(Other Insights Shared)

- We need others to hear this
- It's about time

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No question, your company has had good success, yet in this new high-speed/on-demand economy you know key business decisions are being made in a hurry, the majority of the day is reactionary, team alignment and communications are weak. The results; increased frustrations, waste and cost, decreased team motivation, and declining personal lives and profits. Now for the good news; effective leadership can transform your business while driving double digit value creation.

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