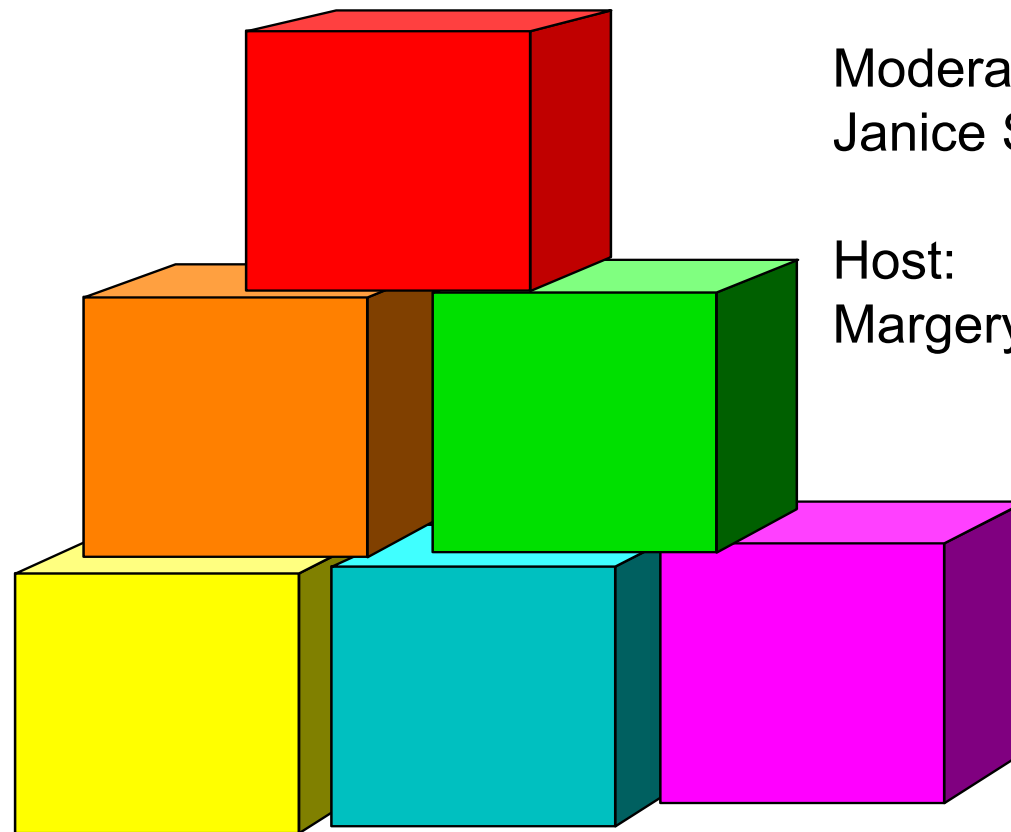


Building Blocks for a Successful Consulting Practice: **Session 2**

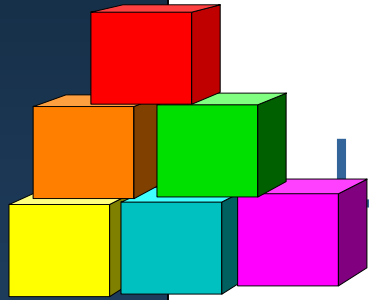
Moderator:
Janice Scanlan CMC

Host:
Margery Mayer CMC



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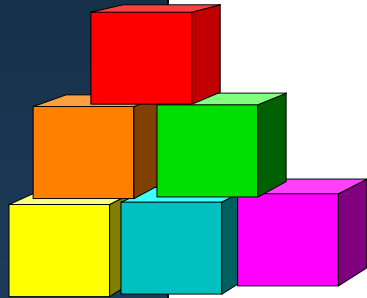
Learning Objectives: Session 2

- It's not what you do, it's how you make the client feel—lessons from the client side.
- How to generate more revenue and higher margins through repeat business.
- How to “put it all together without killing yourself.”



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Lessons Learned From the client side

Building Blocks for Success:
Client Focus

Byron Streitz CMC

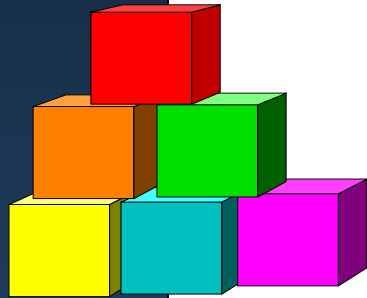
www.SynchrosConsulting.com



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How To Build Repeat Business

Building Blocks for Success:
Revenue Generation
Linda Hanson CMC

www.LLHEnterprises.com



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Why?

- Grow the Practice
- Sustain the Practice
- More Profitable Practice



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Existing Clients Are Good Prospects

- Less Price Resistance
- Less Learning Time
- Higher Profits
 - Less marketing costs
 - Less sales costs
 - Higher fees
 - Less engagement problems



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Clients vs. Prospects

Existing Client

Aware of new need: Ensuring Client Delight

Not aware of need: Marketing to Client

Prospective Client

Aware of new need: Selling/Proposing

Not aware of need: Generating
Leads/Enquiries



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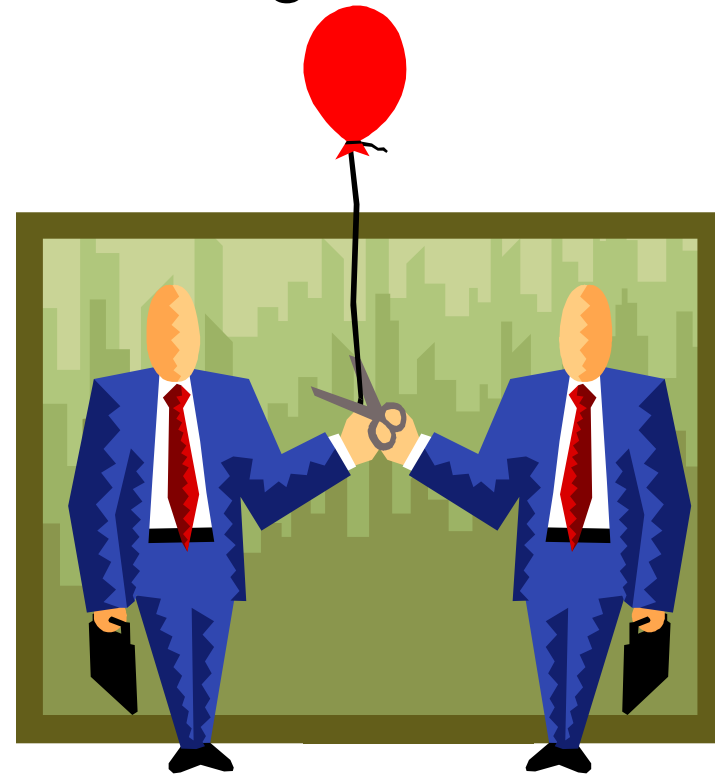
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How?

Service Quality = Client Delight

- Quality of Work
- Client Experience
- Establish Value
- Listen to Clients



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Quality of Work

- Meet deadlines
- Keep promises
- Show interest
- Clear communication
- Ask questions



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Client Experience

- Management of project
- Training
- Feedback



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Establish Value

- Give clients options to choose
- Make meetings more valuable
- Make reports valuable
- Help clients use what is delivered
- Be accessible and available



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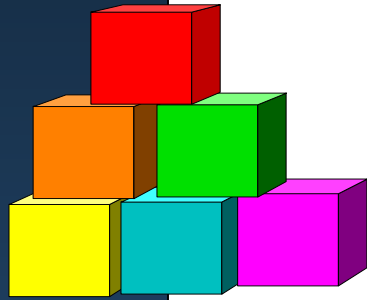
Repeat Business Exercise



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How To Build Successful Plans

Building Blocks for Success:

Keeping on Track

Patricia Wiklund Ph.D.

www.PatWiklund.com



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Five One Page Business Tools



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One Page Business Plan



- Who you are
- What you do
- Who you do it for
- How much you want to do
- Where you're going



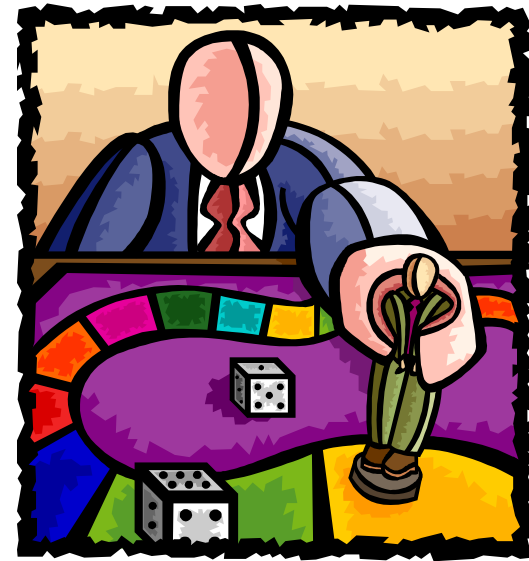
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One Page Marketing Plan

- Target markets
- Target sales
- Yearly projects
- Quarterly activities



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One Page Sales Plan



“Pipeline Report”

- Who is in the queue?
- What needs to be done next?
- Worth?
- Likelihood?



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One Page Client Services

- Services/Themes/Products
- Targets
- Activities
- Benefits



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One Page Financial Summary

- Monthly summary
- Year to date
- Monthly average
- Projected year



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Ops Manual

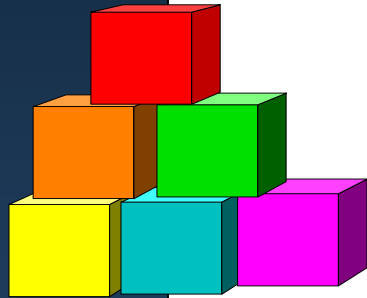
- Beer truck insurance
- Systems
- Vendors and suppliers
- Contractors and backups



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Exercise

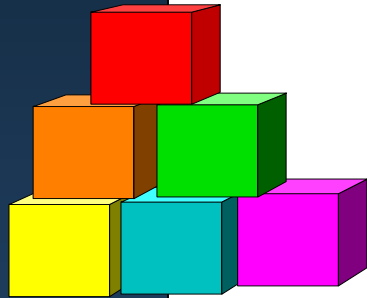
Pulling It Together
without killing yourself.



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Answers to YOUR Questions

- Elliott Black CMC
- Rosemary Walter
- Byron Streit CMC
- Linda Hanson CMC
- Pat Wiklund Ph.D.
(in order of panel appearance, Session 1 and 2)
- Janice Scanlan CMC, moderator



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