

BD actions to build into busy days

A compendium of approaches that are working for others in professional services



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Things to do at your desk

Be an extra pair of eyes and ears in your client's sector and highlight pieces of relevant news and developments to them.

Use LinkedIn updates to share professional insight (articles, guides, tips) with comments on news, or reactions to new legislation.

"Better to do something imperfectly than to do nothing flawlessly."

Dr Robert Schuller

Not urgent, but important; take the time to update your contacts database. It will pay dividends.

Assess your new business pipeline. How many meaningful conversations with potential clients will you have this month? How many was it last month?



Make one call or send one email a day to a client/contact you haven't heard from in a while. You'll soon create several quality re-connections you wouldn't have had otherwise.

Identify what you can do today to make the working day of one of your contacts more enjoyable.

If you're trying to approach a potential client, see if any of your network on LinkedIn are connected to them. Can they make an introduction?

Send your client information to forward on to their clients or valued contacts. Design the layout so they just need to 'top and tail' it.

Spend 15 minutes a day thinking about what else you can do to help your client. Then do something about your thought...

When putting together your daily 'to do' list, add two or three small BD actions to it and commit to doing them. It works.

Things to think about

Clients want to know what others are doing in their sector or job role. Be valuable by benchmarking them against peers.

If you can understand who your client's client is, the nature of your advice will be significantly better.

Treat BD with the same importance as a client of yours. Protect time in your diary to undertake BD actions – and stick to it.

Your contacts are more likely to refer business opportunities to you if you have done the same for them. What opportunities can you give to a contact today?

Look into the future. What trends and developments are likely to affect your clients and contacts? How could these generate work?

Show that you are more organised than others – eg think further ahead than your competitors with event invitations to get the best people there.

Get out of the office more. Winning business in the current economic climate means getting in front of people.



Remember that your best clients are your competitors' target clients. Keep close and be proactive. Prove to your clients that you are worth it.

Consider what others inside and outside your sector are doing to grow their business. Can you adopt or adapt? Look at your competitors' websites – what can you learn from them?

"To be better than your competitors you need to be proactive; find the areas where you can add greatest value to us, make suggestions, give us ideas, talk to our people – know where we are going, and help us get there."

Finance Director – FTSE 100 business

Building the bond

"The key is not to prioritise your schedule but to schedule your priorities."
Stephen Covey

Be brave – ask your client to come in and tell your team about their vision, goals, challenges – and how they want you to work with them.

Celebrate success with the client after an assignment. It helps to cement the relationship for the future.

Ask a senior contact for their advice and input (eg into some research). Treat them as a major player. It will impress.

Create a shared agenda of issues and points to discuss with your clients so you can be in 'relevant touch' on matters important to you both.

Don't be afraid to challenge your client's current thinking when you know it is in their interests to consider other options.



Genuine reciprocity pays dividends. Think of a favour you could do for one of your colleagues or contacts.

Help client contacts and add value by finding out how they are measured and the targets they have to hit. Can you help?

Offer the use of your facilities, e.g. board rooms and seminar rooms, for your clients' own meetings. It is added value at no real cost.

Offer to put two of your contacts together for mutual business benefit. Which pairings could work?

Set up a client panel of respected clients and ask their views on your service.

Planning for success

BD motivation requires appropriate incentive. Give yourself and others clear targets and rewards if you want to succeed.

Break your BD plan down into manageable 100 day action plans – it works!

Calculate the average annual fees you get per client. Think about what you need to do to increase this by 25%.

Diarise calls or emails valued contacts you need to touch base with, otherwise they won't happen. You will be overtaken by the urgent work of the day.



Get update meetings with key client contacts in the diary in advance. Share a potential agenda with them 2 days before you're due to meet.

Impress a client's senior management by planning ahead with scheduled six monthly or quarterly 'issues and opportunities' update meetings.

"You will never find time for anything. If you want the time, you must make it."
Charles Buxton

Manage your social media by setting aside 1 hour each month to brainstorm the issues you and members of your team want to be seen to comment on.

Travelling by train or plane? Use some of the time for BD – plan calls, send catch up emails, check out the latest on your network.

Set weekly, monthly and annual business development tasks for yourself in line with your workload. You're more likely to develop new business if you do.

Sit down for 20 minutes on a Sunday night to plan your proactive BD for the week. It keeps you strategic and focussed.

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Working with others

Make a point of introducing one colleague a week to your contacts. Who will it be this week?

Add value to your network – think about who you could pass a referral or new business opportunity to this week.

Bring together your colleagues who work on the same client account. How could you add value to the client in 2014?

Double up with a colleague on BD – share ideas, contacts and give them permission to be a ‘friendly challenger’.

“Our attitude towards others determines their attitude towards us.”

Earl Nightingale

Encourage colleague referrals: spend time with those who have synergy with your expertise or who specialise in the same industry sector.

Guide colleagues on the ‘hooks’ they should look out for in client conversations to be able to propose your expertise and help.

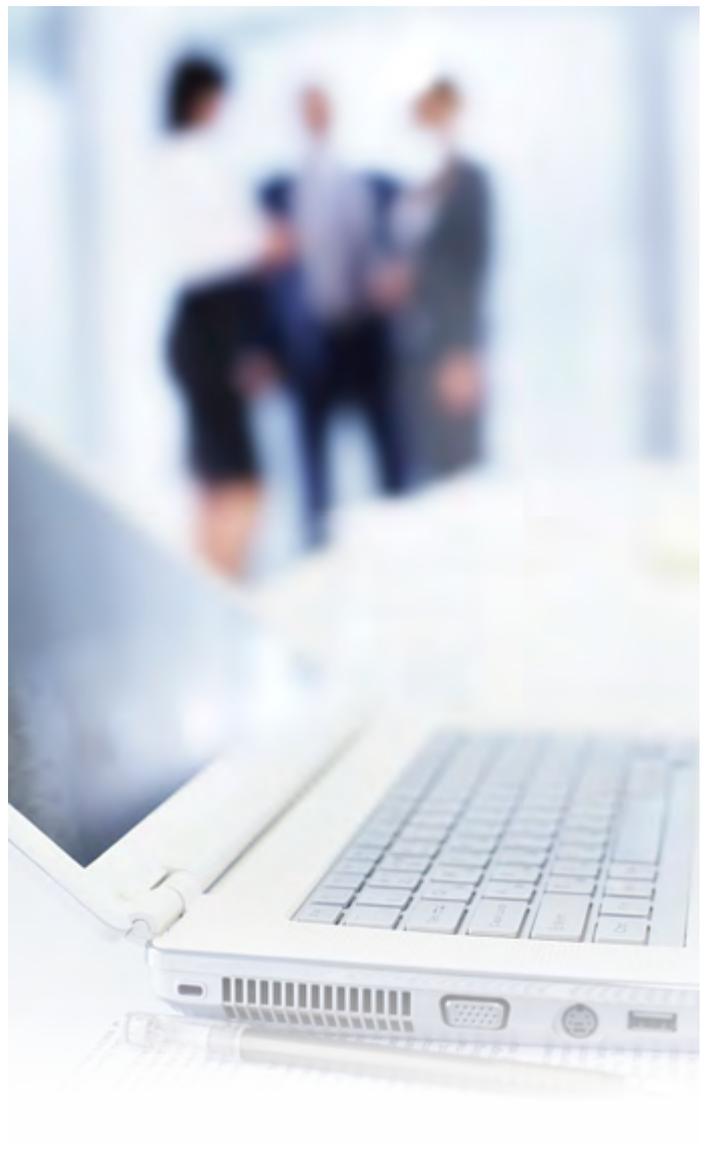
Look out for opportunities to refer work or valuable contacts to your clients. It’s a great way to demonstrate you are thinking about them.

Stimulate more referrals: set up quarterly lunch or catch up over coffee with a contact to find out what you’ve both been up to.



Use joint events with other advisers to gain access to new contacts quickly. Follow up appropriately and keep the other adviser informed.

Which contact could give you an introduction to a relevant decision-maker? Consider what you need to do to ‘earn’ that introduction.



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