



*How well do you know your clients and customers?*

## Client Engagement — Know Your Client Part 2

Welcome to Part 2 of Engaging Times— “Know Your Client”

In Engaging Times part 1 we left you with some questions on how well you currently ‘Know your clients’. In this issue we are going to push a little deeper into the behavioral elements of ‘Knowing’ your clients.

In our conversations with service providers we regularly ask our clients: “How well do you know your clients?” On many occasions the typical response is “I know my clients pretty well– they’ve been with us for ‘x’ years”. In our experience that report is not always the response of the service provider’s clients.

The rules are changing for knowing and engaging your clients. Clients expect to have an experience that mirrors their internal behavioral belief system around how they like to be served. Anything short is missing their expectations. But how do you know their behavioral belief system? You do it by understanding how they are wired for communication.

This step allows the process of engagement to go beyond a process of simple fact finding expedition. It enables an authentic, and valued client experience to be had. It enables you to present information to them in ways that work for them, it allows your interactions with the client to be consistent and valued, it allows the knowledge capture of this client to stay with the organization, regardless of who is serving the client.

## Principles for Client Engagement

### Know your client

What value does your client base hold for you? Do you actually know?

For many of us, we rarely take the time to understand our clients sufficiently to answer these questions.

Ask yourselves some basic questions: Who are your clients? What are their strengths and what does this mean for future growth? How could you assist them?

### Engage with them

In engaging with your clients, it is always a good exercise to specifically ask your clients how often they like face to face interaction.

# Exploring Client / Customer Engagement

This is a critical point for most companies. While many sophisticated companies will have established an understanding of their clients through their buying patterns and deep segmentation processes, the ability to relate to the client 'in the moment' is in most cases not understood or captured. In companies where it exists it often relies on the talented sales or service individual to remain in their role.

This level of corporate knowledge needs to be available so that it can be drawn upon by any person in your business whether sales or service in supporting this client into the future.

Knowledge management of behavioral information becomes an even more important issue when economic times get tough and companies seek to reduce costs through staff reductions, mergers and acquisitions. Much of this client knowledge is lost in this process unless you have an effective behavioral relationship system.

Another key consideration in 'Knowing your client' is the importance of realizing that deepening your knowledge of clients requires you to have an ongoing attitude of valuing the clients relationship. Apart from their preferred communication style, most other elements of the client relationship are dynamic and not static and therefore active ongoing engagement is critical to the long term value to be derived. We often tend to assume that our initial fact finding and subsequent touch points of interaction bring us into a place of knowing our client. For many this is far from the truth.

## *Client relationships are dynamic not static.*

In building this knowledge bank, it can be the simple things of where have they worked in the past, who do they know, what good or bad experiences have they had with people that will determine your success in the relationship. All forms of client knowledge are useful, both the positive and the negative. The positive information for leveraging in your dealings with the client and the negative feedback allowing you to navigate the potential issues with a clear view.

Clients come alive when you research and keep track of their internal and market based business dealings. A number of times, clients have said to us: "You are more up to date about our business than I am". Why? Because we care for them and want to create a lifelong relationship with that company. Knowing the client is the first step in deepening levels of trust. Mutual trust naturally opens up many more opportunities where your products and services may be required. It provides the opportunity for conversations around areas of need. Knowing these issues or needs at times has allowed us to brainstorm solutions with a client or enabled us to direct them to someone we know who may be able to assist them. This level of trust comes through a deep knowledge of the client and their dynamic needs. Clients appreciate it when you are working with them for their success. It is all facilitated by the ongoing principle of 'Knowing your client'.

Knowledge of your clients and customers will position you for success against your competition especially when economic winds of change are blowing. Enjoy the journey.



This does require an open conversation between your representatives and the client with predetermined views put aside.

It is also important to understand your representatives behavioral preferences as this provides the context to how they interpret the clients preferences.

### **Grow** your relationship

Relationship value is determined by the client. The value they place on your offering is measured by the length of time they stay with you, the share of wallet they allocate to your company and the references they provide for you.

Do a stock take and ask yourself; What is the average length of time clients are with you; How much of their wallet share do you enjoy?; and how many reference clients have they provided?

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