HO_Planning your initial client visit

Here is a possible way of organizing an initial half-day visit to a company:

Sequence of meeting		**Have available…**
1.	Start off with an introduction of yourself, explaining the general purpose of the visit	
2.	Make a preliminary presentation of energy management and its possible benefits for the company, emphasize triple win	Handouts, brochure
3.	Get permission to take a look at the company using the EnMS Maturity Matrix tool. Explain that this tool allows the company to get a quick idea of the present situation of its energy management.	EnMS Maturity Matrix tool
4.	Suggest that the management, production manager, EHS or Utilities-in-charge and you separately fill the questionnaire	Have 3 - 4 extra copies of the Maturity Matrix tool readily available
5.	Conduct walk-through visit and gather information to answer the quick scan questions	
6.	Meet after the walk-through to review the results Present your finding Compare your findings with the answers entered by the company representatives Encourage a reflection on the findings Explain how the CM program can address shortcomings identified	In case you have a notebook computer with you, enter the findings into the spider-web diagram
7.	Decide on the next steps Conclude meeting	Prepare minutes and share with company

Once you are back from the meeting, reflect (1) whether you have been able to achieve your objectives, (2) what has gone well and (3) what has not get well and why.

Some more tips for interacting with your client

(1) Do Your Homework!

	Do you have a good game plan for the meeting and your presentation?
	Are you clear on what you are asking from your client?
	Have you clearly thought through the purpose, objectives, benefits and risks related to the proposal? Can you clearly state these? Are they stated from your client's perspective?
	Do you understand the business impact (+ and -) for your proposal?
	Do you have clear documentation for the project to review or leave with your client?
	What can you negotiate and what is non-negotiable?
	What can you learn about your client? How will he/she look at your proposal?
	Can you predict what kinds of objections and concerns your client may have?
	Do you need to rehearse your presentation and get feedback?
	If you have a negative experience with your client, how will you remain objective and calm?

(2) Plan Your Presentation

Content of the presentation

	What are the purpose and expected results for the proposal?
	What specifically are you asking your client to do?
	What are the expected benefits for the proposal?
	What are the expected costs and risks in the proposal?
	What alternatives were considered and rejected?
	What is your implementation plan?
	What is the time line for implementation?
	What kind of resources will be needed?
	How will you support the change?

Process of the presentation

	Who will be at the meeting? What will they know about the situation?
	How should you start the presentation?
	What are the 3 to 5 key points in the body of the presentation?
	How will you close the presentation?
	What kind of visuals do I need?
	What kind of documentation would help?
	How can you plan for participation so that client concerns will be surfaced and dealt with?
	How will you field questions?
	Where and what kind of resistance and objections do you expect?

Presenting Your Proposal:

	Clearly state what you want.
	State your major arguments.
	Speak in terms of your client's perspective.
	Present benefits as well as features

Surfacing and Listening to Client Concerns

	Help client express concerns, objections and resistance.
	Give lots of opportunity for your clients to express their concerns.
	Summarize the concerns before moving on. Listening is your ticket to talking.
	A very powerful consulting skill is to make your client's concerns visible on a whiteboard or flipchart. Making information visible is a powerful listening tool. Making the concerns visible also allows us to move on.

Building Win/Win Relationships:

Build one to one relationships wherever possible

People will defend their self-esteem beyond all else. Do not make people look dumb, especially in public

Involve people early if you need their commitment later

Find coaches, people who help you and let you know where you stand, in every client location

If Difficulties Occur:

Talk about the impasse, differences of opinion

Help your clients vent their feelings

Avoid pushing matches with your clients. The harder you push, the harder most clients push back

Closing a Client Meeting:

Summarize the major agreements

Clearly state the next steps for you and your clients

If an important agreement or a fair amount of work is involved, write a confirming letter or proposal

Thank your clients for their time and effort

Set up next meeting

Ideally all these steps should conduct later to sign a consultant contract and to interact with the client so that he can solve his problem with your support.

Source: www.consultingskills.com


The Consulting Process
Mission accomplished...
Review & Evaluation
Initial contact
Begin here...
Contracting
Implementation
Information Gathering
Action Planning
Analysis & Reporting