

UPSELL ADVISORY TO EXISTING CLIENT SESSION PLAN

	What?	Done?
BEFORE THE SESSION		
1	<p>Research your existing client, e.g.</p> <ul style="list-style-type: none"> • Company website • Annual accounts and information held at companies house • Google search on the company and key individuals' names • Social media, e.g. LinkedIn, Twitter, Facebook • If appropriate “mystery” shop the business to get a feel for the business • Compare and contrast their business with their competitors <p>Use Spotlight Reporting to print off for the last quarter and last 12 months. If your client doesn't currently buy Spotlight reports from you, this is an opportunity to showcase their value, particularly if you have sector-specific templated reports:</p> <ul style="list-style-type: none"> • Management reports • KPI reports <p>Look for:</p> <ul style="list-style-type: none"> • What's new and significant? • Large gaps between budget and actuals • Big variations between this year and last year • Any trends which could become significant <p>Specifically look at:</p> <ul style="list-style-type: none"> • Profit and Loss Analysis – What does the year-to-date position look like? How are we doing on budget vs actuals, and this year vs last year? Where are there material differences? What does the forward projection look like? • Cash Profiler – How healthy is their cash position? Can they pay their important bills every month, e.g. wages. 	
2	<p>Send a proposed agenda with objectives of the session to the client. A typical agenda will normally include the following:</p> <ul style="list-style-type: none"> • Client update – what has been happening? Are their goals still the same? Project updates? • Update and exploration of the financials and KPIs • Looking forward, e.g. next steps, opportunities <p>Clarify who will be attending the session and time available to run the session.</p> <p>Set up Spotlight Reporting so you are able to use the client's KPI dashboard and if necessary data in the forecasting tool.</p>	

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<p>3 Before the session have to hand:</p> <ul style="list-style-type: none"> • Spotlight reports for client and/or anonymised examples of Spotlight Reports for the client's specific sector • If you use it, your fee quoting tool 	
IN THE SESSION	
<p>4 Clarify the client's objectives for the session. Script these up so everyone can see them.</p> <p>Potential questions to use:</p> <ul style="list-style-type: none"> • Has anything changed since we last met? • Does the agenda match what you want to achieve? • What do you personally want to achieve as a result of running your business? • What do you want to achieve in this session? 	
<p>5 Check that the client is happy with the agenda and approximate timings</p>	
<p>6 Spend, ideally, at <u>least half of the session</u> getting the client to talk about their business and their personal situation. You want to discover and explore:</p> <ul style="list-style-type: none"> • Their personal, financial and business objectives <ul style="list-style-type: none"> ◦ How well they are currently achieving them? ◦ What is the risk (financial, reputational, personally) to them of not achieving their objectives ◦ What they have tried already to help them achieve their objectives – how well did it help? • Biggest challenges they face in running their business or achieving their objectives <ul style="list-style-type: none"> ◦ Explore the root causes for these challenges ◦ The threat or impact of not solving these challenges • Good questions to ask to get them to open up about their business and challenges include: <ul style="list-style-type: none"> ◦ What's the biggest thing you are working on right now? ◦ If you could wave a magic wand what would you change about your business? ◦ What's changing in your world? ◦ What threats do you see now and in the future? ◦ What challenges are you facing in your business? ◦ What's working/not working at the moment in your business? • Use the Spotlight reports you prepared earlier to explore with your client the true state of their business. 	

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<p>7 Ideally you would have:</p> <ul style="list-style-type: none">• clarity on their biggest pain points• the cost to them of not solving these• their urgency to solve them• their emotions regarding these pain points <p>If you don't have this information do NOT start to discuss solutions with them.</p> <p>Ask permission to start to explore how you could support them further to help them achieve their objectives and overcome the challenges they are currently facing.</p> <p>Identify options of additional services you could offer them, and, if appropriate at this stage, share likely fees for this.</p>	
<p>8 Identify and agree next steps from the conversation, e.g.</p> <ul style="list-style-type: none">• Proposal• Next meeting	
AFTER THE SESSION	
<p>9 Send the list of next steps to the client and any relevant notes from the session to the client.</p>	

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