

# 12 Twelve Steps to Effective Client Relationship Management:

A dozen easy-to-implement steps to foster the client/vendor relationship.\*

## 1 Treat the Client as the Boss

One of the most potentially irritating buzzwords to clients is the trendy, business-in-the-nineties notion of partnership. In a high-level context, the word partnership may indicate a joint interest between the client and the vendor. The client is paying the vendor to do a job, and if the vendor does the job well, both parties benefit. However, when all is said and done, clients are always in charge; they have the final say. Clients make it possible for vendors to pay bills and meet payroll. Too often, it is easy to lose sight of this fact, especially if the client has an easygoing demeanor.

## 2 Remember the Client Has a Boss

We all report to a higher authority in one way or another, and it is no different for our clients. They have their own bosses demanding to see high performance results. Many times, our clients may wish for us to believe that they are the ultimate decision-makers, or they have complete control over the marketing budget for their division. This may be true as long as the client is able to show positive results and develop new ideas. But, just as a vendor stands a chance of losing market share if performance is poor, clients also stand the chance of losing responsibility should the vendor's performance suffer. Ultimately, the clients are not only the boss, they each have a boss.

## 3 Go See the Client

Too often in this technologically advanced environment, we forsake face-to-face contact for the more expeditious electronic medium. We communicate with a client via fax, e-mail and voice mail, and send correspondence via overnight delivery. When the client's schedule permits, encourage site visits. Or, as the vendor, respect the client's time and arrange to meet on their turf. Consider bringing members

*Respect, hard work, and humility are still the underpinnings of success and, no matter what the future holds, they'll always be the basis for the strongest client/vendor relationships possible.*

of the client's account management team. The visit then becomes a way to expose the account management team to the client's world, while familiarizing the client with vendor personnel. In addition, this type of visit can serve as an ongoing audit to access the needs of both the vendor and the client. A visit to the client may be costly, but worth the investment to maintain good relations.

## 4 Don't Make Excuses to the Client

Since telemarketing is one of the most labor-intensive of all industries, with clients often requiring last minute changes, it is not uncommon for a telemarketing vendor to make an occasional mistake or experience an oversight. One simple rule of thumb when this occurs – be honest with the client without making excuses or

By Thomas L. Cardella, President  
Thomas L. Cardella & Associates

It has been more than twenty years since I first entered the contact center arena, and many changes have occurred, some good and some bad.

The industry grew from infancy in the early 80's to an estimated trillion-dollar-per-year industry today. Advances in technology like IVR, predictive dialing, and CRM software have become staples, and modern computers have made today's contact center nothing short of a technological marvel. And let's not forget about the emergence and importance of email and the Web.

While growth added jobs, Do-Not-Call legislation threatened them, with shorter prospect lists, increased compliance requirements, and higher costs for everything from training to technology to marketing. Pressure from low-cost call centers in India, the Philippines, and other countries where the cost of living is a fraction of ours also decreased revenues for American providers, and fueled a decade of industry-wide consolidation.

And of course, the current shaky U.S. economy, including a weak dollar, has led to belt tightening across every industry—clients and vendors alike.

Yet, in the face of these sweeping changes, I see that some things remain the same. The excerpt that follows is from an article I published almost ten years ago. When I look back, I am surprised by how it all applies today. Respect, hard work, and humility are still the underpinnings of success and, no matter what the future holds, they'll always be the basis for the strongest client/vendor relationships possible.

becoming defensive. We all make mistakes, even our clients and their bosses. The vendor that readily admits a mistake, as well as provides a game plan to correct the error, will have a more favorable client relationship in the long run.

## **5 Take the Client's Phone Calls**

With the convenience of voice mail, it has become all too easy to avoid time-consuming phone calls when one is busy. Nothing irritates a client more than having a vendor dodge phone calls. Vendors should promptly take all client calls or have a system in place that informs the client when the call will be returned. Many times, the client is calling in reference to a question or a request from someone higher up in the organization. Keeping a client waiting not only damages the relationship between the client and the vendor, but potentially between the client and their boss.

## **6 Provide the Client with Proactive Feedback**

Typically, clients only spend an occasional hour or so per week monitoring the calling campaign. The telemarketing vendor needs to remember that with the majority of time spent in the call center environment, it is necessary to act as the eyes and ears of the client. Appropriate feedback – such as ways to enhance an offer, improve a script or rethink the calling strategy on a data file – should be compiled and given to the client in written form.

## **7 Solicit Feedback From the Client**

Given the opportunity, most clients would love to provide feedback to the vendor on program performance. Done properly, the telemarketing vendor should welcome this feedback as a way to improve the vendor-client relationship. Rather than allowing issues to build-up, encourage clients to schedule constructive feedback sessions with the account team on a regular basis.

## **8 Do the Client's Job**

Another way the vendor can enhance the client relationship is to determine if additional opportunities exist to serve the client. Not only does the relationship grow stronger, but doing so can also save time and money for the vendor.

*\*Excerpt originally published in Customer Interaction Solutions Magazine, April 1998.*



**About the author:** Thomas L. Cardella is President of Thomas L. Cardella & Associates. A pioneer in the contact center industry, Tom has built and led small, medium-sized, and multi-million-dollar companies. His experience has earned him Ernst & Young's Emerging Entrepreneur of the Year Award, The Small Business Administration Entrepreneurial Award, and a place on the Inc. 500, as well as ten consecutive years of quality awards from Customer Interaction Solutions.

## **9 Enhance the Product Delivered to the Client**

A telemarketing vendor should always be looking for ways to improve the quality of the client's calling campaign. This means that even if a vendor happens to be one of several telemarketing agencies the client is using and it discovers a significant way to improve the client's program, that improvement should be shared across the board with all vendors involved. This type of cooperative approach will not only save the client time and money, but also demonstrate to the client that the company is always working in the client's best interests.

## **10 Allow the Client Easy Access to Staff**

Just as a vendor's day continues into the late hours of the evening or the early hours of the morning, it should also be expected that the client's does, as well. Unless, as a vendor, you expect to cover the office 24-hours-a-day, you should give your clients the ability to contact key account management staff whenever necessary. Whether it be through a pager, cell phone or home phone number, clients should always have a means of contact in the event of an emergency, as well as alternate means of contact during regular working hours.

## **11 Understand the Client's Perspective**

Understanding the client's perspective is as important as good call quality or sound results. The vendor needs to understand the client's industry, accomplished by reading trade journals and attending industry seminars, as well as through discussion with the client directly. The vendor who is able to put itself in its client's shoes will be in a better position to make decisions in the best interest of the client and more effectively communicate the client's needs throughout the organization.

## **12 Establish a Climate of Mutual Respect**

Finally, there is one additional component that must be present in order to build a lasting relationship with the client – the ability of the client to respect the job and position of the telemarketing vendor. Clients who are less than honest or who demand the impossible are only setting themselves up for disappointing vendor relationships. When both client and vendor bring shared respect and understanding to the table, a long and mutually beneficial relationship will result.

**Thomas L. Cardella**  
ASSOCIATES

Contact Center Specialists

2738 Edgewood Road SW | Cedar Rapids, IA 52404 | Ph: 319.730.4000 | Fx: 319.730.4100

[www.tlassociates.com](http://www.tlassociates.com)