Guest Speaker: Touch Plans — Making sure your client contact strategy is effective and well-executed.

Help your firm's leadership and technical staff to remain in close touch with prospects and clients.

By Anne Scarlett, first printed in the *AE Marketing Letter*

Keeping in touch — regularly and authentically — with clients and prospects is an essential marketing strategy. To non-marketing professionals, this responsibility is overwhelming. For this reason, client relationship management (CRM) systems were created. Yet, rarely does everyone use this software effectively. How can you, as a marketing professional, help your leadership and technical staff to make the touch process systematic and automated in practice, but memorable and sincere in perception?

I suggest meeting with each of the key players on an individual basis, to help them create their own personal touch plan for the year. But first, facilitate a group session to brainstorm every viable means to touch folks within your target markets. In addition to obvious touches, such as entertaining and in-person visits, here are some initial ideas to propose.

FOR CURRENT CLIENTS:

Integrate touches within project. Capable project managers prepare detailed, published project schedules. Within this schedule, include separate, color-coded activities that are specific to off-project communication, aka marketing. What about a "How well are we communicating?" lunch at the end of each project phase? Or, perhaps at 50% completion of construction documents, a leader from your firm (unbiased, outside the project team) calls to gauge the client's satisfaction level. Maybe one year after "occupancy," the schedule reflects a post-occupancy evaluation (which should be considered when building the original fee), which is often technical in nature. Whatever touch points you choose to "officially" include will be executed, just like any other scheduled tasks. Encourage your technical staff to make these marketing touch points as "typical" as holding a project kick-off meeting or preparing a cost estimate.

FOR PROSPECTS AND PAST CLIENTS (NOT CURRENTLY ACTIVE):

"We're aware and we care." Scan for any news relating to your targets by conducting a proactive Internet search on a bi-weekly basis. When possible, set your online news sources to automatically send alerts of publicity on your prospects and clients. Because everyone contributes to marketing, this is an excellent task for a junior technical staff member or an administrative person. First, make a list of all key prospects and past clients. Divvy them up among the "monitors." Whenever something new arises, the monitor will pass along the information to a pre-determined person in marketing or leadership, who will then follow-up with a personal note to the client acknowledging the news. Perhaps the sentiment is congratulatory. Or, perhaps it's offering empathy or support to address a challenging situation. Maybe the outreach is a quick e-mail, or maybe it's a handwritten note with extra copies of the news report.

Reach out when least expected. My grandmother would always surprise us by sending checks on obscure "holidays," such as Groundhog Day and summer solstice. Stand out from the crowd by sending festive cards (preferably handwritten, but it could be an e-card as well) at unusual times of the year. Believe me, it will be welcome and smiled upon!

Send out an offer. Whether it's a simple letter or a clever mailer, people will take you up on "offers" provided they are compelling and easy-to-approve (aka, inexpensive with quick turnaround). Maybe it's specialized research specific to their industry. Perhaps it's a limited audit, assessment, or study. Make sure to send the offer in small batches, and then boost your results by following-up with at least one phone call or message to sign them up or probe about other ways you can help.

Extend invitations to events. If you are attending a networking event, professional association meeting, or speaking engagement, why not invite prospects to join you? If they are not members of the organization, then they may find this appealing. As well, many prefer going to events with a colleague rather than solo. While there, help them expand their own network by making a concerted effort to introduce them to folks.

Share your network. At some point, let each targeted contact know that you're doing a "share my network" campaign. Ask them what sort of person could they benefit from knowing. Make a note of their "network wish list" and promise that you will think about relevant folks in your own network— financial resources, legal gurus, real estate professionals, non-competing consultants. Whenever possible, facilitate introductions between contacts. This gesture will make a lasting impression.

Give the gift of resources. If you have a favorite business book or tool that you've discovered, why not give it as a gift? When bought in bulk, this can be affordable, and you can make sure that your firm's logo and personal inscription is included somewhere (for example, a bookplate in a hardcover book).

When meeting one-on-one regarding the individualized touch plans, consider creating a graphic chart to map out the frequency of touches required for each prospect. Drawing from the array of ideas you brainstormed as a group, lets each individual use their own judgment in terms of their most effective touches. To ensure accountability, make sure everyone reports their progress at marketing meetings or in another public format (i.e. CRM system or a matrix on your firm's intranet).