BUILDING PARTNERSHIPS

Powerhouse

www.powerhouseplanning.com

Building Partnerships (with Clients)

the Powerhouse Way

There are countless ways to build professional relationships with clients, colleagues, partner organizations, etc. While reflecting on Powerhouse turning double-digits in 2022, we realized our approach to building these types of relationship may be a little different than most. We are, by no means, stating that our way is the best way, but we are passionate about sharing lessons learned with others so that we all have the opportunity to grow and flourish. Whether you are curious about additional ways to build client relationships, are starting out on your small business journey, or just want a quick read, we hope you'll enjoy (and learn something) from this anniversary present from us.

Over the years, we have learned that the best way for us to approach business relationships is to view them as potential friendships. We think of any new partnership in the same way you might view starting a new personal relationship. There's the initial meet, or first date, followed by those first few dates where you're starting to get to know one another but just aren't sure whether you're a good fit yet. Then there's the transition to "going steady," where you know there's at least potential for a great friendship but you need to figure out how you best fit together. Of course, we're all hoping for "the one," that perfect fit, and we think we've established a pretty good idea of how to navigate the ins and outs of cultivating those.

It all relies on bending and flexing. Flexibility and the ability to pivot are crucial to any good professional relationship. Think back to your first days of high school (we know, the horror): Everyone was looking for "their people." Maybe you're a drama person or a band geek, an athlete or an academic type. So, you sit with that crowd at lunch. As the relationship progresses, you may discover you're not a drama person after all; you're a band geek. So, you take your tray and make the switch. Professional relationships work in much the same way. The only difference is that you don't necessarily need to switch lunch tables. You can bend and flex your professional relationships as needs change.

Powerhouse's unique remote team solution allows us to do just that: bend and shift as clients need change. We can customize any team and tweak the members of it as needed. For example, we may start a relationship with a client thinking they need social media expertise but realize along the way that they also really need graphic design or project/administrative help. We can shift our approach to meet the client at their point of need—which, when you think about it, is exactly how we work with our friends. Sometimes they need us to be a cheerleader, other times a listening ear, and sometimes they just want someone to relax and let loose with. When we bend to meet the needs of others, we foster great relationships.

Below you will find some tips and tricks we've learned over the last ten years for fostering strong professional relationships. We'd love to hear what ideas you have and how you grow your professional relationships as well. Learning from each other is really the most effective tool, after all.

Top Seven Steps to Build and Cultivate Partnerships

1. **Research, research, research!** You have a potential new client connection. Before any first call or communication, do your research. We mean do that deep-dive, wanna-learn-everything-there-is-to-know-so-you-can-be-their-number-one-fan kind of research into that potential new client. Casually "stalk" (in a good way) that potential client, donor, etc. Visit their social media pages and website and learn everything you can about what they stand for, what their vision is, how they view themselves. When the first meeting or first communication occurs, the client will be impressed that you cared enough to learn everything you could about them before you ever even spoke to each other.

2. **Set up your discovery call/discussion.** This, in Powerhouse world, is what we consider the "first date." You've learned all about your potential client or donor, and now is where that research pays off. Have questions prepared that will awe/shock them with how much you know. Show them you are truly interested in them, not just in what they might need from you, or vice versa, but in them as an organization. Look at this first date as setting the stage for a relationship. Remember, a relationship goes both ways, so be sure to ask what the client wants to get out of the relationship as well. What matters to them?

3. **Send a small thank-you.** After that "first date," send a small thank-you gift: a Starbucks gift card or a small gift that is meaningful based on the conversation you had. Include a handwritten (if possible) note thanking them for taking the time to speak with you, to let you learn more about them, and to give them a chance to learn about you. Highlight any items from the call that particularly struck you (in a good way). Tell them you are looking forward to the next steps.

4. **Provide a guide of what the relationship will look like moving forward.** This is what we consider "second- and third-date" territory. Have toolkits ready to send to your new (or still potential) client. Provide step-by-step guidance on what they can expect from you moving forward and what you expect from them. Send questionnaires designed to help you really get to know them, or at least the people on their team with whom you will be working most closely, in depth. It's important to continue to establish that this relationship is mutual and relies on effective communication from both sides.

5. **Build your team.** Your discovery call and subsequent communications should give you a solid idea of the client's wants/needs as well as more intangible things, like their leadership style or the types of people they like to deal with. Build your team with that in mind. Provide a truly customized plan and team for that client. It shows that you understand them and that you are invested in them because you've taken the time to build a plan completely around them.

6. **Routinely check in with clients.** Building relationships goes far beyond that initial courtship process. You need to cultivate that relationship. Just like in your personal relationships, your professional relationships need regular "checkups" and "tune-ups." What you get from your professional relationships will be directly related to how much you invest in them. Client retention occurs when clients feel appreciated and prioritized. So, make a habit to check in monthly and discuss pain points, happy points, where you're hitting the mark, and where you're slightly missing it. Nurturing that relationship in this way will ensure continued success and strength.

7. **Assign a client experience team member.** Most small businesses (and large) focus on landing a client. Few actually assign an individual of their team to be responsible for ensuring that the relationship grows and sustains success. Establish a client experience toolkit that can be used to continue nurturing your relationships and keeping them healthy. Consider including things like "fast facts" about those members of your team who work on that client retainer. Finding ways to continue to relate and grow the relationship is key.

Pro Tips

1. **Set communication targets and implement them each month.** There's a reason effective communication is important in every relationship we have, whether it be personal or professional.

2. **Remember flexibility is key.** Bending and flexing are at the heart of meeting clients at their point of need.

3. **Keep things genuine.** Listen to your clients, potential partners, etc. When you cultivate your relationships in a genuine way, you'll be surprised how much you learn, how much more effective you can be, and how much stronger your relationships will be.

4. **Take the pulse of your clients often.** Use that client experience team member and have her/him reach out at least every other month.

5. **Get testimonials from your clients.** As you approach that first contract termination point, reach out and ask if they'll provide a testimonial of what their experience has been like, regardless of whether you will be recontracting with them or not. Remember, even if it's not particularly flattering, a testimonial gives you feedback you can use when building and cultivating your next relationship.

Want help building your client relationships or have an interest in learning more about how to have a partnership with Powerhouse? Contact us today at admin@powerhouseplanning.com. Learn more about Powerhouse at www.powerhouseplanning.com.