

## **Checklist -- Communicating with Prospective Clients**

### **Analyzing Characteristics of Prospective Client:**

- Seeks challenges, initiates activity.
- Risk takers, nothing ventured; nothing gained.
- Goal oriented, driven by results.
- High ego.
- High energy.
- Wants to win; inherent dislike for losing or failure.
- Works hard and longs to be successful.
- Seeks their own solutions to problems; in this way their independent nature comes into play.
- Creative and active minds; at times, visionary.
- Challenges people who volunteer their opinions.

### **Communicating with Prospective Client:**

- Provide questions, alternatives and choices for making their own decisions.
- Be specific and leave nothing to chance.
- Give strokes for their involvement.
- Provide suggested systems for them to follow.
- Be isolated from interruptions.
- Ask specific (preferable "what?") questions.
- Come prepared with all requirements, objectives and support material in a well organized package.
- Most comfortable in environments where constraints can be loosened.

### **Why They Might Say "No"**

- Don't perceive cost/benefit.
- Don't believe the hype; they've been burned before.
- The perceived pain outweighs the expected benefit.
- Perceived lack of time.
- They think they already have the answers.
- They think that they've already tapped their co-workers knowledgebase.

- View this as another "re-engineering" program.
- Don't trust the individual selling it; lack of relationship and credibility.
- Thinks their CPA, CFO, etc., is already doing it.
- Don't want to risk the "time" even if they have a satisfaction guarantee.
- Don't want someone to take them back to "ground zero."
- Don't want to risk embarrassment.

#### **More "Tips"**

- Are you clear about the purpose of your communication?
- Do you know what you want to happen as a result? (What will people feel or think? What will they do?)
- Do you know exactly with whom you need to communicate?
- Have you identified the 'WIIFM factor' (what's in it for me)?
- Have you mapped out what you want to communicate?
- Have you put it in order?
- Have you identified what one thing you really want them to hear and remember?
- Have you identified the one thing that they will want to know?
- Have you identified the right time to deliver the presentation?
- Have you identified and prepared any 'tools' that might help you (e.g., pictures, stories, evidence)?