



"Retention is not simply one more operating statistic, it is the central gauge that integrates all the dimensions of business and measures how well the firm is creating value for its customers."

- Frederick F. Reichheld,
The Loyalty Effect

"If you leave client retention to chance...chances are you'll lose clients."

- John Gamble

***Do your sales people have steadfast commitment from their best customers?
What steps does your sales team take to retain their most valuable customers?
Are they considered trusted advisors?***

PREMISE

Many workshops focus on how to win new customers but spend very little time on retaining existing customers. Yet research shows that retention of top customers is every bit as important, if not more so. Most sales professionals believe they are doing what is expected to retain their most valuable customers – they may be highly responsive and provide them with all your company has to offer. While these things may contribute to the retention of key customers, one of the best tools for keeping customers is also one of the most overlooked tools: holding Customer Business Reviews.

WHAT IS A CUSTOMER BUSINESS REVIEW?

Simply stated, a Customer Business Review is:

- A formally scheduled session of approximately two hours between key representatives of both your company and a top customer's company.
- A session designed to review the business your two companies have done during a sales period, highlight key accomplishments, discuss any outstanding issues or problems, and agree on a plan for future growth.

WHY HOLD THIS WORKSHOP?

The Customer Business Reviews workshop provides sales professionals with a systematic methodology to plan for and conduct superior business reviews with their most valuable customers. The five units of the workshop move quickly, are easy to follow, and provide all the practice and reinforcement needed for your sales teams to be able to hold high-quality business reviews.

WORKSHOP DESIGN

There are five units in this workshop that will take participants through what they need to do and prepare for before holding their first Customer Business Review.



BENEFITS TO THE ORGANIZATION

- Promotes loyalty and customer retention.
- Provides a forum to discuss upcoming growth initiatives and new products and services.
- Promotes side-by-side growth between your company and your customer's company.
- Maximizes interaction between your sales team (including sales management) and your customers' senior management.
- Provides a forum to address customer concerns in a non-hostile environment.
- Can be facilitated by your own team by following a step-by-step Leader's Guide.

BENEFITS TO YOUR CUSTOMERS

- Increases management's ability to inspire people and achieve company goals.
- Provides a forum for open communication between your two companies.
- Provides customers an opportunity to share their direction and to challenge your company on how you can better serve their business.
- Offers ideas and insights on possible ways they can grow their business.

WHAT PEOPLE ARE SAYING

"This meeting really helped enhance our relationship. They opened up more than they ever had. One customer told me this showed him that we don't take them for granted!"

"We had 4 people there and they had 7 people. It gave us a great opportunity to review all the things that we planned to achieve. We came away with a handshake and tremendous commitment for additional business."

"We learned a lot about issues they had with our organization that we did not know about. Many of them were small stumbling blocks, but if put together and not addressed, we may have lost their business. Probably sooner than later."

"I thought this gave us a great opportunity to thank the customer. They saw us as a collaborative team for the first time. They want to do it again next year."

BENEFITS TO YOUR SALES TEAM

- Maximizes income, production, and personal growth.
- Provides upper management a way to connect with the company's most valuable customers.
- Provides focus for retention and growth.
- Motivates changes needed to achieve goals with the customer.