

A SPECIAL THOUGHT-LEADER ARTICLE FROM BULLHORN



Choreographing the Client Visit

The proactive approach to maximizing the effectiveness of face-to-face meetings

by Fran Goldstein

The strategy for cultivating exclusive relationships with more than half your clients

- Meet your top 10 clients once a quarter.
- Educate your client about the value of the quarterly visit.
- Speak like a consultant to establish yourself as an expert.
- Do the research.
- Ask open-ended questions.

The choreography of the client visit

- Contact and educate the client.
- Set the agenda in advance. Email the document as a PDF file, including the full agenda and the participants. Ask the client to review and edit. Express that you are looking forward to the meeting.
- Stick to the agenda. Recap at the end, stating the action plan and the next step.
- Always bring résumés of two or three top candidates.
- Send a thank you note within 24 hours, recapping the action items of the meeting and reinforcing the decision to meet. Restate the ROI of the visit and pre-close for the next.

Today, staffing firms enjoy a hot market. Our clients need us to find trained people in a tight labor market that's getting tighter with the onslaught of baby boomer retirement. Yet, (in a 2006 Staffing Industry Analysts survey), the clients of staffing and recruiting firms gave the industry a "B-" for client satisfaction. That disturbing statistic should be a wake-up call to sales professionals. It's time to pay attention to client relationships.

Developing stronger relationships now can yield real benefits. We can maximize ROI and grow accounts from small to high volume. The techniques we master now will carry our placement firms through the lean years that will inevitably come. In more than 25 years in the sales and recruiting business, I've learned the value of a little-used tool to unlock relationships that bring results: the properly choreographed client visit.

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What we can accomplish in the face-to-face meeting far surpasses the advantage of any technology. The direct experience of a person — the tone of voice, the body language — eliminates the misunderstandings that can sometimes come from email and playing telephone tag. Meeting people establishes trust and credibility. Nothing is as powerful as personal contact, yet we resist scheduling a visit with our clients. We don't think we have the time, but can we afford not to make the time?

The client visits we do arrange are often squandered opportunities. The meetings become chatty and social because we have not been trained how to conduct them. We don't know what to say and what to expect. Clients, meanwhile, resist meetings they've learned from experience will be a waste. No wonder client visits in our business have become limited to stopping by at holiday time with a gift or showing up to do damage control.

Waiting for an issue to crop up before setting up a client visit puts us in total reactive mode. We can begin to feel out of control and burned out. When client visits are planned regularly with a specific purpose or objective, however, we feel empowered. We become what we truly are — consultants instead of order takers. Our clients sense the change in attitude and focus; and that alone can transform our relationships. We get access to key decision makers; and that translates into sales.

When clients really understand the value of the visit, and realize there will be results, they want to meet. When we accomplish the agenda we jointly set with

our clients, we both feel the power. The relationship begins to build, one meeting at a time, and clients look forward to the next visit because the return on investment is mutual.

This approach has not only enabled me to open many accounts after the first client visit, but also has resulted in exclusive relationships with more than 50 percent of my client base. Here's what I suggest:

- Meet your top 10 clients once a quarter. Make it the way you do business.
- Educate your client about the value of the quarterly visit. You'll receive access denied to the competition when it's clear you're a placement expert who cares enough to find out about the trends and business goals of your client.
- Speak like a consultant: use phrases such as "I recommend...", "My experience is..." and "What we are seeing in the market..." to help establish you as the expert. A sample introduction might be: "My experience has proven that the most effective way for me to produce for you is to invest in an onsite face-to-face meeting."
- Before the visit, do the research. Ask your client open-ended questions like these to find the hot buttons: "Describe your most recent hire." "What could a recruiter do to help in your hiring process that would exceed your expectations?"

Meet with a specific purpose. If the client is new, the objective of a first meeting would be to learn the culture: tour the client's facility, meet the hiring managers, review the terms and obtain signatures on the fee agreement. Subsequent reasons to meet include:

- performing a needs assessment
- reviewing a performance evaluation
- introducing your CEO
- explaining a new recruiting initiative at your agency

Each face-to-face meeting will build your relationship.

Leverage the client visit as an opportunity to establish your uniqueness. I offer to record or videotape visits with my clients. Besides documenting meeting details that might otherwise be missed, the videotape makes a great thank you gift clients really appreciate. They like reviewing their own "performance" on camera. The shared video experience helps seal our relationship, and sets the precedent for future meetings with me.

I'm not alone in seeing the positive results that can come from the properly choreographed client visit. One person I mentored told me she was struggling to meet her sales numbers, and despite near burn-out efforts, she was falling further behind. I asked her when was the last time she had gotten out to visit clients. She said she was "too busy, didn't have the time." I convinced her to make the time and schedule a series of face-to-face meetings. She used the approach with one prospect, telling the executive this was part of a new quarterly process that would help the placement firm become aware of changing trends,

operational shifts and service expectations of the company. The client's reaction was: "Wow! The competition never did this before. I don't think they cared. When can we get together?!" No wonder that first client visit has led to a successful long-term relationship.

I choreograph my client visits with four simple steps:

- Contact and educate the client.
- Set the agenda in advance. Email the document as a PDF file, including the full agenda and the participants. Ask the client to review and edit. Express that you are looking forward to the meeting.
- At the meeting, stick to the agenda. Recap at the end, stating the action plan and the next step. Always bring résumés of two or three top candidates and be prepared to describe their qualifications succinctly when an opportunity arises.
- Send a thank you note within 24 hours, recapping the action items of the meeting and reinforcing the decision to meet. Restate the ROI of the visit and pre-close for the next.

Meet your clients quarterly or more often based on your business objective.

Have a specific objective for each meeting. The reason should be unique, customized, consultative and designed to generate sales.

Build your relationship one meeting at a time. Make sure you present yourself at your professional best.

Be prepared for objections. Validate what the client is expressing. Ask open-ended questions to take the conversation deeper and uncover the solution to their objection.

Stick to the meeting agenda. Recap at the end, stating the action plan and the next steps.

Throughout this process, an On Demand, integrated front-office solution like Bullhorn is critical to maintaining client relationships and can set us apart from the competition. Staffing professionals need to be able to document the process, track meeting dates and times, store conversations and link to the Internet. How we do our jobs is what interests our clients. Inviting a client back to the office to

see the use of technology like Bullhorn provides another opportunity to distinguish our firm.

Choreographing the client visit establishes our role as the consultant and true expert. Implementing a structure and agenda to the meeting enables us to maximize the ROI to our clients. We streamline their hiring process, strengthen placements and the retention factor and ultimately save our clients time and expense. We're off to a beautiful relationship.



About the Author

Noted entrepreneur and mentor Fran Goldstein leads Gold Staff Consultants (GSC), a proven resource dedicated to delivering comprehensive professional placement, motivational platforms and leadership support services for corporations, business owners and entrepreneurs looking to exceed their goals.

Goldstein, a successful business professional known for her passion, vision and innovation, started GSC in 1993 solely to provide staffing and placement services. More than a decade later, GSC has built on the success of their core business to encompass expanded consulting services. Understanding the dynamics of ongoing business trends, GSC knows what it takes to maintain and grow a business from the bottom up. GSC is staffed by experienced, customer-centric professionals committed to providing expert advice while delivering straight-forward service.

About Bullhorn

Bullhorn is the global leader in On Demand, integrated front-office software for the staffing and recruiting industry. Founded with a vision to empower staffing and recruiting professionals worldwide to achieve the highest placement rates in the industry, Bullhorn's leadership is based on innovation and service, providing the only On Demand and completely integrated staffing and recruiting software for the industry.

Acclaimed by more than 850 customers and 10,000 users, including emerging, medium and large staffing and recruiting firms servicing a wide range of industries, Bullhorn is in use worldwide. Information technology, professional services, executive search, office/clerical and health care represent a few of the many job markets Bullhorn serves as the preferred staffing and recruiting software solution, enabling them to generate job orders, land searches and place prospective candidates from temporary workers to executives.

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