CLIENT MANAGEMENT 
COMMUNICATIONS: THE FOUNDATION FOR SUCCESS

Managing relationships and delivering results

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WHAT WE’LL COVER TODAY

- Why communications matters
- Effective communications
- Understanding needs and managing expectations
- Building trust with clients
- Delivering results
- Top tips
WHY DOES COMMUNICATION MATTER?

Communication is essential to successful project management.

When you communicate effectively you will improve:
- Performance
- Collaboration and creativity
- Client satisfaction
COMMUNICATION IS KEY

Communication is one of the most important aspects of project management.

Project managers must:
- Gather information
- Disseminate it across teams
- Coordinate responses
RESULTS OF SUCCESSFUL COMMUNICATION

**Referrals and positive word-of-mouth**
83% of clients say when they trust a business, they will recommend it to others.

**Loyalty and retention**
5% increase in client retention correlates with at least 25% increase in profit for your business.

**Client satisfaction**
Clients that are "totally satisfied" deliver more than twice as much revenue to your business than a client who is "somewhat satisfied".
QUALITIES THAT WILL HELP YOU

Always listen  Be proactive  Ask questions  Offer solutions
EFFECTIVE COMMUNICATIONS
HOW TO COMMUNICATE WITH CLIENTS
HOW PROJECT MANAGERS COMMUNICATE

COMMUNICATION IN PROJECT MANAGEMENT

- Verbal
- Non-verbal
- Writing
- Visual
- Listening
CHOOSE THE RIGHT TYPE OF COMMUNICATION FOR THE RIGHT SITUATION

- Emails live forever
- Give the speaker your focused attention
- Think before you speak
- Show your intent
- Visuals can simplify the complex
TIPS FOR COMMUNICATING WITH CLIENTS

- Be confident, clear and professional
- Engage in active listening
- Learn their communication style
- Get organized internally
- Be timely
Consider the **purpose** of the communication
- Prepare **in advance**
- Anticipate **questions**
- Speak **from the heart**
- Use **humor**
- Look for **win-win solutions**
- Speak clearly and **with purpose**
- Confidence is catching!
CLEAR

- Consider the **right channel**
- Use an **even, confident voice**
- **Proofread** emails
- Be **concise**
- Identify **needs and action steps**
- Always know **why you’re communicating**
Consider your audience
Pay attention to body language
Consider your tone
Avoid being too casual
Know when to take conversations offline
Listen and restate what you hear
ACTIVE LISTENING

- Do not interrupt
- Make eye contact
- Give head nods and verbal listening signals (“mmhm”)
- Paraphrase and summarize what they said, “so what I hear you saying is…”
- Ask clarifying questions; don’t assume you know
- REALLY LISTEN
COMMUNICATION
STYLES

- Do your communication style and your client’s communication style match?
- Adapt your approach to their style

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<td>Relationship-oriented</td>
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Excitable
People-oriented
Task-oriented
Even-keel
INTERNAL COMMUNICATION: TALKING TO YOUR TEAM

- Set **goals**
- Set clear **roles**
- Give clear **direction**
- Identify the **best channels** and tools for your team
- **Identify problems** in the communication chain and collaborate with your team to find solutions
- Utilize **technology**
- Welcome **feedback**
- CC the **right people**
TIMELY COMMUNICATION

- Always respond
- Respond quickly (when possible)
- Consider the best channel
- If you don’t know, respond and let them know you’re getting more information
- Provide your client plenty of time to response
- Include timelines and deadlines in your communications
McKinsey & Company predict after the pandemic, 20-25% percent of workforces will work from home between three and five days a week. 3-5x more than before the pandemic.

Virtual is here to stay:
- Reduces cost
- Saves time
- Grows attendance
- Increases access to experts
TIPS FOR VIRTUAL MEETINGS

- Turn on your camera
- Mute and unmute at the right time
- Focus like you’re at an in-person meeting
- Engage as you would at an in-person
- Avoid interruptions
- Organize before the meeting
- Share meeting documents in advance
- Set clear expectations/define outcomes
- Respect the time of others
MANAGING EXPECTATIONS AND UNDERSTANDING NEEDS
GETTING ON THE SAME PAGE WITH YOUR CLIENT
CAN YOU ANSWER THESE QUESTIONS?

1. What are your client’s needs?
2. What are your client’s goals?
3. Who are the stakeholders involved?
4. How do you add value to your client?
IMPORTANCE OF SETTING EXPECTATIONS

Setting communication expectations is like an informal version of a contract.

When everyone is on the same page it:

- **Reduces risks** of confusion and misunderstandings
- Increases odds of **client satisfaction**
- Shows you **care** about the client
- Saves **time**
- Helps you do your job more **efficiently and effectively**
RISKS OF POOR COMMUNICATIONS

Poor communications can impact your project and the bottom line.

Dangers include:

- Missed objectives
- Missed deadlines
- Decreased productivity
- Going over budget
- Lack of confidence from your client
What is your **scope**? How will you meet their needs?

Who is on your **internal team**? What is each person’s role?
  - Who does the client need to be introduced to beyond the project manager?
  - Who does the client contact for what questions?

How often you will **meet**? How do they prefer to meet?

What is the approval and **decision-making chain/process**?

What is the **project timeline**?
BUILDING CLIENT TRUST

THE IMPORTANCE AND QUALITIES OF A TRUSTWORTHY PROJECT MANAGER
Trust is the foundation of all relationships, including with clients.

When you build trust, you:

- Add value to your client
- Improve your reputation
- Create a relationship
- Increase the chance for more business
WHAT MAKES YOU TRUSTWORTHY

You are reliable & creative
You have expertise & experience
You deliver results
You add value

Trust is key
Everything we’ve covered so far (communicating, listening, understanding needs, setting expectations), helps build trust. Here are a few more ways to demonstrate you are trustworthy:

RELIABLE  AVAILABLE  HONEST  PROACTIVE  AUTHENTIC
EXPERTISE AND EXPERIENCE: WALK THE BRIDGE

Walk the Bridge
Abraham Lincoln Bridge Opening
December 5, 2015
DELIVERING RESULTS

EVALUATING CLIENT SATISFACTION AND COMMUNICATING YOUR ACHIEVEMENTS
CLIENT SATISFACTION

1. Set goals and expectations
2. Deliver on your promises
3. Clients share positive experience
4. New and repeat business

Happy clients
COLLECTING FEEDBACK

How do you know if your clients are satisfied?

Feedback only works if you use it:

- Conduct satisfaction surveys
- Encourage reviews
**WHAT SHOULD A SATISFACTION SURVEY LOOK LIKE?**

**Tips for satisfaction surveys:**
- Set clear survey **objectives**
- Be short and **concise**
- Create **specific** questions
- Put **results into actions**

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1. **How satisfied are you with the following parameters of client service:**

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<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Neutral</th>
<th>Dissatisfied</th>
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<tr>
<td>Issue Handling Capability</td>
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<td>Executive Competence</td>
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<td>Time for solution</td>
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2. **How professional was the executive in providing you a solution?**
   - Very Professional
   - Adequately Professional
   - Neither Professional or Unprofessional
   - Not Very Professional
   - Not At All Professional

3. **Did the client executive make you feel appreciated?**
   - Yes
   - Maybe
   - No
CLIENT TESTIMONIAL: MEDQUEST COLLEGE
REVIEWS

- Create opportunities to leave reviews
- It’s okay to simply ask if your client is willing to leave a review
- If you get a negative review, respond kindly and remedy if possible

92% of B2B buyers are more likely to purchase after reading a trusted review

Evan Matthews
Local Guide - 15 reviews

⭐⭐⭐⭐⭐ 9 months ago
Positive: Professionalism, Responsiveness

I worked with C2 Strategic on a website project and their team was super helpful, polite, and prompt! They made the experience so smooth and easy. I would highly recommend them!

Like
TOP TIPS FOR CLIENT MANAGEMENT

YOU’RE READY TO BE AN EXPERT COMMUNICATOR!
TOP TIPS: COMMUNICATING WITH YOUR TEAM

1. Clarity:
Set well-defined goals and roles and ensure all team members are informed

2. Openness:
Welcome feedback from your team and collaborate to find solutions to internal communications obstacles

3. Honesty:
Create a respectful and transparent internal communication environment
TOP TIPS: COMMUNICATING WITH CLIENTS

1. Listen: Active listening to understand client needs and how to meet them

2. Be Proactive: Bring solutions to the table; show your value

3. Build Trust: Earn trust by setting clear expectations and delivering on promises
TOP TIPS: SETTING THE TONE FOR SUCCESS

Communication can help **set you apart**!

- Communicate clearly, confidently and professionally
- Communicate your strengths and experiences
- Communicate how you add value
THANK YOU!

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Q & A