It is imperative for strategic thinking of client-facing professionals.

Companies spend millions of dollars on marketing campaigns to generate new business. What they fail to see is the potential in their client-facing professionals (CFPs) who hold the key to many opportunities for business expansion and retention in the B2B market. If these professionals could only see how they have the potential to impact business results, once they are armed with the use of competitive intelligence and rewarded accordingly, they would become “engaged” in the success of their company.

MARKET KNOWLEDGE AND COMPANY’S GROWTH

Market knowledge is key to a company’s growth. Knowledge is insight gained from the intelligence in information. If this knowledge is spread across all levels in the company among key stakeholders and used wisely, employees become engaged in the success of the company and growth will be sustained. According to a Dale Carnegie white paper, companies lose over $350 billion a year because of employee disengagement (Rothwell 2007).

STRATEGIC INITIATIVES FAIL IF EMPLOYEES ARE NOT ENGAGED

Companies often wonder why the implementation of a customer relationship management (CRM) system failed to produce the desired results. A key contributing factor is disengagement of employees, who are an integral part of the process but do not understand why the company needs the system to remain competitive in the market. No one took the time to share these insights. Similarly, if CFPs do not understand their client’s business and their own employer’s business, they become transaction-oriented.

Strategic does not mean just executive

There is a mistaken belief that “strategic” means executive or senior management decisions. What it actually means is decisions that have longer term or larger implications for the company. So, an action taken by even a frontline clerical person can have longer term effect. It can change the course of the company.
INTELLIGENCE UNDER LOCK AND KEY

Most companies designate a person or a department to gather, analyze, and disseminate intelligence to influence “strategic” decisions. The intelligence comes nicely packaged and presented to senior management. Not only is this not integrated into insights, it is kept sealed.

Intelligence rarely trickles down to some of the other stakeholders in the company. It is guarded as a trade secret. Scattered forms of competitor information titled “profiles” are maintained online for sales teams to access. However, access is restricted and very few know how to use this information. I look at these profiles and often wonder, “So what does this mean to my job?” (See Figure 1.)

In 9 out of 10 cases, intelligence and insights rarely make their way to CFPs of the company. Information is executable at this level and immediate benefits can be reaped. Unfortunately, this is not recognized in many companies.

WHO ARE THESE FORGOTTEN STAKEHOLDERS?

Companies pour millions of dollars on business development efforts led by a highly compensated army of dedicated sales professionals, while they ignore the most obvious venue for expanding business – their client-facing professionals.

These CFPs work directly with the points of contact in client companies as account specialists, account teams, or a myriad other positions that signify the role of managing the account and handling the work on a day-to-day basis post sale. Titles and roles vary with each industry. The CFPs sometimes, as in the case of IT outsourcing, work onsite at client locations. The higher-level professionals such as VPs, directors, or leaders oversee this account remotely along with multiple accounts in their portfolio. In most cases are the only ones armed with market intelligence (See Figure 2).

However, intelligence does not trickle down to CFPs. They face the customer on a daily basis and are witnesses to the many market issues confronting the customer. Arming them with intelligence and the skills to use it in customer interactions would translate to significant expansion of business. They see the customer’s pain points

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**Figure 1: Online Profiles**

<table>
<thead>
<tr>
<th>Product</th>
<th>Competitor 1</th>
<th>Competitor 2</th>
<th>Competitor 3</th>
<th>Competitor 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Features</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benefits</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pricing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value-add</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**Figure 2: Working in a vacuum**
or problems and are well equipped to meet the needs with appropriate solutions or products.

**WORKING IN A VACUUM?**

Imagine the reaction of a customer who called her bank in panic after her credit card had been one of a million subject to a major security breach in a retail store. The story is in all the media. Here is a sample conversation that can send the customer rushing into the arms of the bank's competitor.

- Bank's Customer Service Representative (CSR): Good morning
- Customer: Yesterday, I used my card in that retail store.
- Bank's CSR: Thank you for using our card.
- Customer: You know the store that had the security breach?
- Bank's CSR: What retail store? What breach?
- Customer: You don’t know? I can’t access my account online.
- Bank's CSR: Did you enter the right ID and password?

The outcome of this relationship is clear, is it not?

**EXPERTISE IS JUST ONE SUCCESS FACTOR IN CLIENT RELATIONS**

Most CFPs think their expertise alone will help them satisfy clients. They fail to realize how their expertise will triple in value if supplemented by market knowledge to address the business needs of the client. They become consultants to their client and an active contributor to their employer.

Arming employees with CI and schooling them to use it is one way of involving employees in company performance. As an employee, if I know the goals, problems, and strategies of my employer and my client as well as the “why and what” behind their actions, I start seeing my contribution to growth. My role and what I do become clear. I am no longer an order-taker. I drop the “we-they” attitude, which can be detrimental to long-term relationships. I begin to focus on collaborating with the

**UNDERSTANDING CLIENT BUSINESS MEANS COLLABORATION**

Let’s take the IT industry where changing requirements from clients cause tension between the client and vendor’s CFPs. Negotiations are based on a stand taken by each party. Client says, “You have to keep the due date.” CFP says, “We cannot meet your deadline without more resources.” The CFP is unaware of the client’s competitive pressures. The purpose behind the client’s request and the CFP’s contribution is lost.

Imagine if CFPs had a good and real-time understanding of their client’s industry, business, competitors, goals, and strategies? This intelligence would make them consultative and would be reflected in their day-to-day interactions. It would lead to a collaborative relationship, not a “we-they” environment. Negotiations would be balanced since the focus would be on long-term relationships, and not on one event or issue.

**TURN CUSTOMER PROBLEMS INTO YOUR OPPORTUNITIES**

For entrepreneurs, problems are opportunities in hiding – nothing but a road leading to opportunities for expanding business with clients! However, these account
managers are so transaction-oriented and so insulated from the intelligence at the corporate headquarters, they look at each problem at the surface level and “fix” it without the broader picture in mind. This happens in the IT outsourcing field where the void of competitive intelligence among the CFPs translates to lost opportunities.

The customer call to the bank about the retail store’s security breach was truly a lost opportunity. Quick action and tips on preserving security along with other services, could not only have gained loyalty but also business expansion.

**CONSISTENCY IN THE USE OF INTELLIGENCE TO SUSTAIN GROWTH**

*Leveraging knowledge in client interactions should be a practice and not an exception.*

**What does this mean?**

Some CFPs are unique and take the initiative to equip themselves with information on their client’s industry/competitors along with similar data for their employer. Insights drive their interactions with their client’s point of contact. These professionals bring in more business and maintain long-term relationships. However, this is not consistent across all CFPs in the company. In order to sustain growth, this has to become the practice and not the exception. Best practices do not leave anything to chance. Practice involves uniformity in knowledge and tools to use it. Of course, some will excel, others will not, even with the intelligence.

**WHAT IS THE REMEDY?**

*Information can become a burden if it is not organized, analyzed, and accessible to the right people for decision-making.*

It is very simple. Arm these professionals with the intelligence and teach them how to listen for information when they are in contact with customers, and more importantly, provide the template for them to organize, process, and use this intelligence to become consultants. Most of this is free and readily available. Guide them to find information sources and extract intelligence from everyday reading of industry journals.

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**Figure 4: G.ONE© – Goals, Obstacles, Needs & Expectations**

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NOW THEY HAVE THE DATA, WHAT NEXT?

The point of the exercise is to reduce the information to four key variables in the equation for a consultative solution for your client.

G.ONE.© – Goals. Obstacles, Needs & Expectations

The ultimate objective of this exercise is the insight gained from it. The insight comes from extracting the goals, obstacles, needs, and expectations of the client. Once this is derived, the CFPs identify how their roles fit in the organization and what client needs they are fulfilling.

If you don’t know this as a client-facing professional, you are working in a vacuum, and you will become an order taker where every negotiation on client requirements could turn into a conflict of “we vs. them” and not a collaborative consensus on solutions. For example, when you ask CFPs in IT outsourcing industry, “what is your job?” The usual response is: I am a business analyst, tester, coder, SI, or other. None of these titles truly reflect the client need they fulfill.

HOW DO YOU DERIVE THIS G.ONE.©

It is both a science and an art. The CFPs need to know how to organize the data they gather – a simple process to extract the essence. Each graph, table, chart, or article must have a message. Collating the messages produces a pattern of information.

Slowly this pattern turns to intelligence – what obstacles (such as, market forces, competition, resources) stand in the way of your client achieving their business goals, and what needs to be done to overcome these obstacles, and what does your client expect from you? How can you help your client – that is, where do you fit in this scheme of needs? Matching this intelligence with what we know about the company gives rise to insights (See Figure 4).

IF CFPS ARE ARMED WITH CI, NEGOTIATIONS MAY NOT NEED ESCALATION

Client Demand: You are in IT outsourcing and working for a banking client in implementing a new system. You are well past the design phase and now the client adds new requirements while expecting delivery to be on target. You are in a meeting with this client and objecting to the date and new requirements.

Working in a vacuum: What you did not know was that market forces had created closure of some retail banks and your client had to comply with the government mandate to assume ownership of a retail bank. Hence, the client demands additional requirements and threatens to seek alternate vendors.

CI and management to the rescue: Your practice leader is called in to mediate. The leader, armed with competitive intelligence, is willing to accommodate and recommends prioritization to comply with government mandate. The client is satisfied.

Knowledge would have empowered you: Had you been equipped with the same intelligence (goals, obstacles and needs of client), time and effort would have been saved and you would have been empowered to make the same decision.

SEE “THE WHAT AND WHY” BEHIND CUSTOMER DEMANDS

So, when you are with a customer and he is changing requirements constantly, instead of complaining or taking a stand, see the broader picture. See “the what and the why” behind the demand. If you don’t, negotiation will be based on a stand or a position that both of you have taken and not based on the whole picture. Maybe your understanding will give rise to alternate solutions for the client and an opportunity for you to expand your role in the company. Being armed with intelligence makes you consultative and not reactive. It prevents you from being submissive and compliant to all of client’s demands. Knowledge makes you confident and creative in approaching client needs.

Regardless of your role with the client, you cannot work effectively without understanding their business, threats, and opportunities. If you don’t know WHO or WHAT is blocking your client’s achievement of business goals, and what needs to be done to overcome these hurdles, how can you expect to provide solutions to client problems?

CLIENT-FACING PROFESSIONALS CANNOT FUNCTION IN A VACUUM

I have often been told that “they” cannot spare time for intelligence. I do agree that they have demanding
jobs and may hesitate to take on more. However, they gain more time when intelligence drives interactions with clients. Change will happen if they see how efficiencies can be gained with knowledge. The amount of time wasted in needless discussions over priorities, deadlines, deliverables, and resources can be reduced if negotiations are based on insights. If I know what is driving client demands, i.e. the purpose behind the stand taken by the client, then I am working toward a solution to address the interest of my client and not reacting to the demands. I become responsible and not reactive. I am engaged in the success of my client and my employer.

SUMMARY

• Share market intelligence with CFP
• Present the intelligence within the framework of their roles
• Teach them to
  ⊺ Understand your market
  ⊺ Understand client market
  ⊺ Identify patterns and gain insights
  ⊺ Finally, use the knowledge to be consultative
• Reward them for being consultative

Let knowledge-driven decisions at all levels become the practice and not the exception in the company.

REFERENCES


Mala Subramaniam is a leadership instructor, multicultural communications speaker and executive coach. Mala has taught in traditional onsite and virtual classrooms (webinars). The topics span key leadership areas such as: Dynamic and Advanced Presentation; Soft Negotiations; Practical Competitive Intelligence and Market Insights; Multicultural Communications and Consultative Solutions. She is an adjunct faculty in Cognizant Academy, executive coach for Right Management, and on the roster of the University of San Diego, California for corporate leadership training.

Mala’s extensive career in corporate America spans influential global roles in IBM, GE Healthcare, Dun & Bradstreet and Blue Cross Blue Shield of New Jersey, leading competitive intelligence and strategies, marketing, and strategic planning. She has practical experience in gathering, analyzing and presenting market research and competitive intelligence to C-suite, and facilitating executive, divisional, sales, and operational decision-making. You can reach Mala at mala@mktinsite.com.