

Toolkit 49 How to cross sell effectively by Onboarding new clients

This toolkit was developed to help businesses to cross sell effectively. *The evidence is that one of the best times to cross-sell is when you have won a new contract. This is counter-intuitive, the traditional view is win work, prove your worth and then cross-sell.* This On-Boarding process has proved very successful in organisations that have used it.

1. What is Onboarding?

- It is a meeting arranged by your company, with a new client, designed specifically to *learn more about the client to enable you to understand your client's business, to ensure you really understand and meet their needs.*
- The meeting is held at the start of a relationship, when your company has won a piece of work with a client and there maybe potential for a deeper, long-term relationship.
- The meeting comprises client presentations to your team –including their business strategy, the background to the project, the people involved, etc. It is the role of your team to respond to the presentations and ask good questions, **but not heavy sell!**
- The latter part of the meeting can be used to progress the project, e.g. project planning, or through familiarising the whole project team with a particularly important **process.**

2. How to set up an On- boarding Meeting

- The driver of the On-Boarding meeting is your relationship manager with your client. You should invite key people in your team who will need to understand the client's needs in order to manage the contract successfully, technical, finance, operations, project lead etc
- Position the meeting with the client as an essential and a free part of the project (albeit costed in some way into the project). *Tell them that the event is important to help you to understand their business, which it gives them a chance to meet your people and build relationships with the people they will be working with.*

The aim of the onboarding process is to get as many of the right people from your client involved, even if only for a short amount of time – they should be key people who have an influence over the success of the relationship. This provides opportunities to build relationships , but also sets the tone about the type of organisation you are and how you operate (i.e. you are strategic and interested in broader business issues).

- Design the meeting so that you get as much information on the client organisation as possible - structure, key players, strategy, products, initiatives and so on. Ideally, get senior players from the client organisation involved, to provide this information.
- Involve the internal project team. Success often comes down to fit rather than capability, and if the fit is not right then there will be problems. Clients feel positive about being giving the opportunity to select or de-select project team members. If you get the pre-matching 100% right, then the client is confident you understand them, which gives you extra brownie points. If you don't and they object to someone you are fielding, you get credit for being responsive and changing the team.

- The best people to be there from your business are those who best fit the needs and culture of the client, e.g. commercial people for most organisations; high energy people for city firms; people with technical expertise and diversity for public sector. Some clients like to be flattered by having someone senior there. On the day, dress appropriately for the client organisation.
- Ask intelligent questions about the business throughout the meeting - not just from one person - try to get the whole team to ask good questions.
- After the meeting, follow up the next day with the client contact, to get feedback, identify any issues, and to confirm the project team.

3. Follow up the meeting.

Meet with you team, post event and identify any intelligence that has been gleaned that could lead to further cross selling opportunities. Focus on any problems or challenges the client expresses which you could offer to help them resolve.

Call them up a few days later and suggest you have been thinking about their problems and might be able to help them. Set up a meeting to discuss.

This is the way entrepreneurs grow businesses: Find a customer problem solve it and create a customer for life.

4. What are the Benefits of On-Boarding?

- Better, broader, deeper relationships with clients.
- It provides useful customer intelligence.
- Quality and efficiency of delivery – understanding the client enables you to give them more of what they want and reduces rework. The process improves the quality of the work you do for them – which also helps with winning more business.
- An enhanced reputation with a broader range of people within the client organisation.
- Additional opportunities – sometimes specific new requirements emerge on the day that we can meet. If not on the day, you put yourselves in a good place to hear about additional opportunities later.
- Sales growth over time. Clients where these meetings have held remain clients over a longer period and maintain or increase their spend with you year on year.
- Clients love it – it shows we're interested in them; it looks like we're rolling out the red carpet, and it reinforces that they've made the right decision to choose your company. The client gets to see the team you are proposing, and they can pick and choose the ones they want to work with, to ensure a good fit.

Onboarding can lead to long term Partnering Relationships see Toolkit 50

5. Summary: The On-Boarding process has proven to be highly effective in cross-selling although initially it appears counter-intuitive. Companies have increased their sales using this process. A further benefit is that their competitors are unlikely to be using this approach.

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