



Clients: Motivations and Obstacles 客户动机与障碍

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Objectives:

- Understand broadly the concept of 'Trusted Advisor'
- Understand the needs, motivations and obstacles affecting clients decisions
- Help clients think about their needs and potential solutions, in mutually beneficial ways
- Reduce clients concern and resistance by making recommendations in more compelling ways
- The intent is to help you think in a way that helps you build stronger relationships with clients
- Increase your success



Agenda

Trust and it's implications

Trusted Advisor

Client Decision Making Process

Influence Process

Next steps



The SPEED of Trust – Increased trust results in increased speed and lower costs

Trust is confidence - you know it when you feel it.

↑ Trust = ↑ Speed ↓ Cost

信任

速度

成本

You can have all the facts and figures, all the supporting evidence, all the endorsements that you want, but if you don't command trust, you won't get anywhere – Nail Fitzgerlad

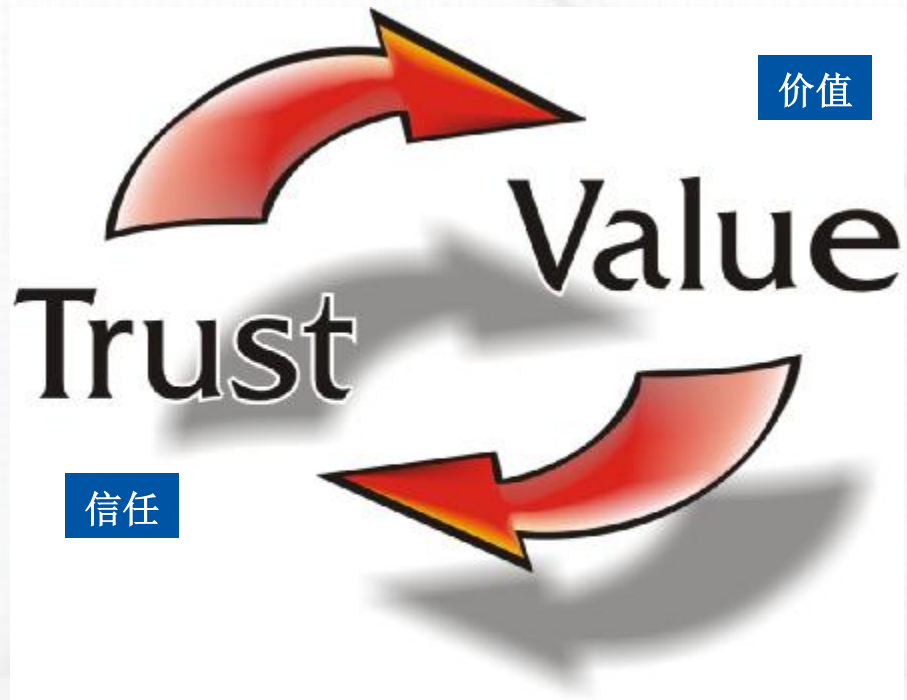


Insights on Trust

- Grows, rather than just appears
信任需要培养
- It can be effectively taught and learned
可以习得
- It can become a leverageable, strategic advantage 战略优势
- Is both rational and emotional
理性与情感兼有
- It entails risk 信任是有风险的
- Is personal 信任的载体是人



Trust and Value Relationship



- The more value you provide, the greater the client's trust in you
- The greater the client's trust in you, the more value you are allowed to provide
- The greater the clients trust in you, the more you can influence their perspective and their decisions



Characteristics of Trusted Advisors 信心顾问的特征（客户访谈）

Executive feedback on Managers who seek to be the Trusted Advisors must first build their credibility in these ways...

- **Do homework on our challenges and then offer solutions that create value**
做好功课、提出创造价值的方案
- **Give us solutions to problems that could not be developed by people in our own company**
对问题的解决方案，是公司内部做不到的
- **Act like they're entering a long-term relationship as opposed to pursuing a single transaction**
着眼长远、不要只看一单交易
- **Be consistent, dependable and forthright in all conversations and discussions**
前后一致、可以依赖、直截了当
- **Be able to marshal resources in their company to get things done**
能够调动供方资源办成事情
- **Serve as our spokesperson and represent our interests in their company**
在供方公司代言客户利益
- **Help us separate logic from emotion**
逻辑是逻辑、感情是感情
- **Demonstrate integrity and capability as a business-person**
展现作为商人的正直和能力

The Trusted Advisor by David Maister, Charles Green, and Robert Galford.



Client Relationships: Thinking Persons Game

- How you **Think** determines what you **See**,
- **What** you See determines what you can **Know**,
- What you Know determines **Who** you can Know,
- **Who** and **What** you Know determines your **Influence**,
- Your **Influence** is your Advantage



Client Decision Making Process

客户决策过程

- The need to establish a more desirable situation – induced by a random event
相遇是偶然的、情景是营造的
- Dialogue begins– defining and exploring the difference and getting perspectives
开始对话——界定和探索差距，汇集观点
- Solution forming – time to solidify the criteria for the solution
形成方案——整理方案要点
- Course of action – alternatives / status quo
行动路径——可选路径/现状
- Implementation – Weighing the risks and committing to a course of action
实施——评估风险、选定行动路径



Understanding the Client

理解客户

- Strong due diligence
 - web sites, SEC filing, Analyst calls, press releases, chairman letters, Google alerts
 - understand internal and external issues the company is focused
 - » Internal – operational, financial, organizational, product or technology
 - » External – clients, competitors, suppliers, regulatory, globalization
- Continuous and ongoing process of learning and discovery



Influence Process

Get Involved –

- Establishing credibility for yourself and your company

Client Perspective -

- What are the priorities, motivations and obstacles affecting their decisions?

Providing fresh perspective-

- Exploring the potential value of issues addressed by your solution.

Form mutual understanding –

- Clients situation and needs

Recommendation –

Course of action

Get commitment from Client

Deliver as promised



Take Aways

- Performance is foundational. Without this it will be difficult to build meaningful relationships
- Treat each client, relationship as unique
- Strive to learn more about the client and its people every day
- **ALWAYS BE CLIENT FOCUSED**



