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## Excellence in Internal Client Encounters

A series of training and workshop sessions
for Intel France, May to September 2021
Session 2

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# Yesterday...

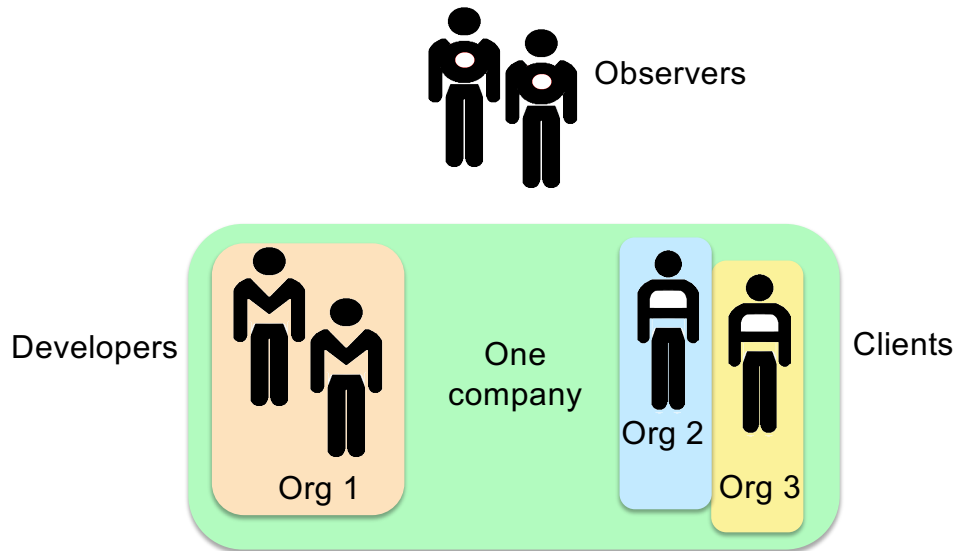... all your troubles seemed so far away, sure ☺

But what else do you remember from
yesterday's session?

Answers to the Chat please … ➡ 💬

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# *Client Encounter Simulation*



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# Getting meetings started

- What is the first thing to establish?
- What will you need to structure the work of the meeting?
- What will you need in order to understand if you have completed that work?
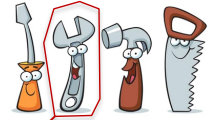- How do you include everyone and encourage their motivation?



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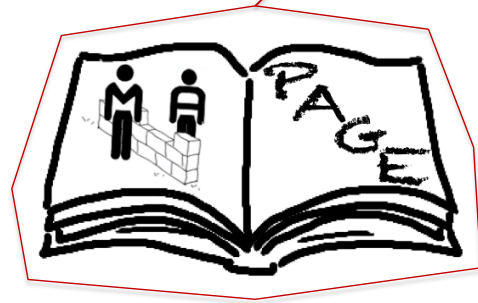© 2021 ICONDA Solutions
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# Engage with PAGE

Greetings are done.  Now agree …

- **P**urpose (why?)
  - The purpose/focus of the meeting
- **A**genda (how?)
  - Include Next Steps at the end
  - Get customer to go first
  - **Minimum agenda = time available !**
- **G**oals (what?)
  - Identify specific goals and associated benefits
- **E**ndorsement
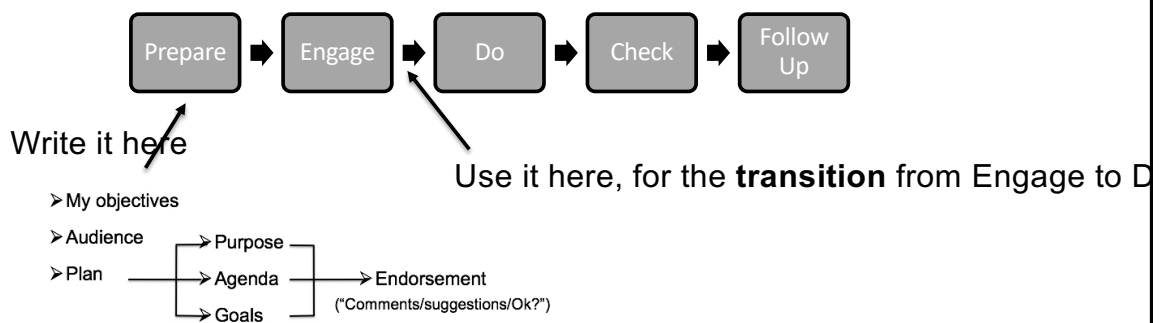  - Check for other suggestions and get agreement

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# Where is PAGE in the flow?

Prepare ➡ Engage ➡ Do ➡ Check ➡ Follow Up

Write it here

Use it here, for the **transition** from Engage to D

➢ My objectives
➢ Audience
➢ Plan
➢ Purpose
➢ Agenda
➢ Goals
➢ Endorsement
("Comments/suggestions/Ok?")

- Use modes:
  - Short or long meetings
  - Prepared or impromptu
  - Proactive or reactive

**PAGE helps you adapt to circumstances!**

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# Objectives vs Purpose vs Goals

- My objectives
  - Part of my/our **private** plan
  - Some things we share, some we don't!
- Purpose
  - The single, overall reason for meeting
    - e.g. to discuss project X, decide resources for Y, etc.
- Goals
  - A **list** of specific things that the encounter should achieve
    - e.g. agree who will do what, exchange info related to Z, etc.
  - Often, we state goals along with their corresponding agenda points

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# Key Benefits of PAGE
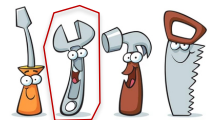
- Gets everyone in sync before the main work starts
  - Expectations, time to be spent, etc

- Always* leads to a **Happy Ending**
  - Orderly meeting end
  - Next Steps agreed

*... happily ever after.*

\* almost

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# Plans…

… what do you expect of them?

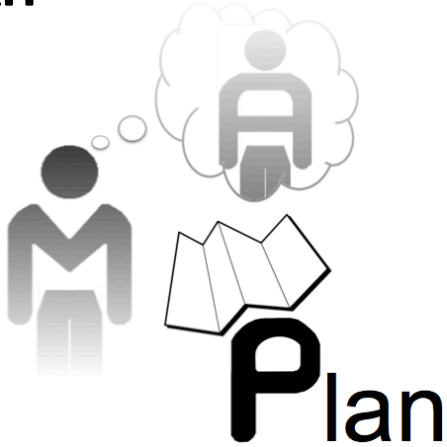As many single-word answers as you want to the Chat please …

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# Plans…

… often turn out to be irrelevant and  useless but …

## planning is essential

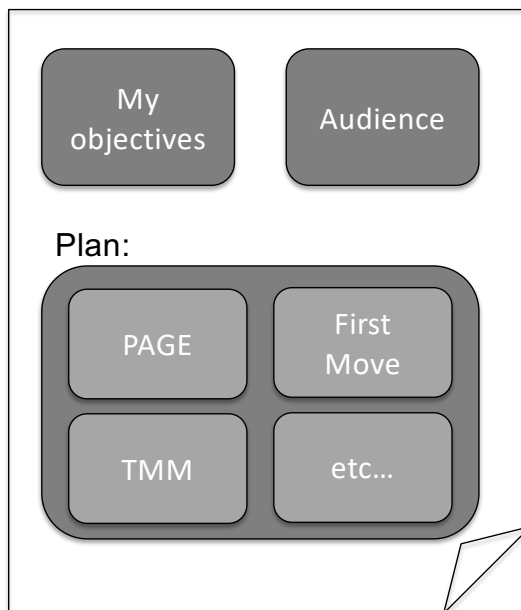## Its value is the NING part!

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## Plan

- Too *much* planning leads to paralysis

- But some forethought is necessary, e.g:
  - Discovery targets
  - Key messages

- Here are 4 tools to help …

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My objectives

Audience

Plan:

PAGE

First Move

TMM

etc…
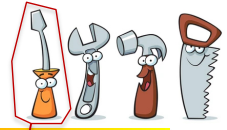
- MAP can be ultra-simple (napkin, back of envelope, …)

- … or elaborate (multiple shared docs)

- In exercises, we look at one component of the Plan at a time but, in practise, they are often combined

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# First Move Plan*

- A list of subjects to tackle (<u>not</u> prioritised)
- A decision on where to start

(you can plan this privately or live, with your client)

\* Thanks to Lynne Cooper and Mariette Castellino, *Five Minute Coach*

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FMP brainstorm using Addapt

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# What is there to find out?

Facts and figures about things

Products, projects, technology, …





Perceptions, concerns and expectations

How A feels about B,

what X thinks about Y, …

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# What types of questions are there?

- It's good to vary (and be aware of) the type of Q's we use:
  - Open
  - Closed
  - ...



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# Question Types

- It's good to vary (and be aware of) the type of Q's we use:
  - Open
  - Closed
  - Umberella
  - Opinion
  - Clarifying
  - Importance
  - Curiosity
  - etc…

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# Basic Question Types

Can you tell me about the project ?

Was version 3.2 released last Thursday as planned ?

How do you transfer data out of the Omnifart module ?

And what was the CTO intending to do with the melon ?

What is your roadmap for the JSL system over the next year ?

How do you think embedded software tools will evolve over the next few years ?

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# Great Questions

Your client's reuqest is unclear:
   "What's the question?", or "Can you give me an example?"

Confronted with an Umberlla question, "Tell me about …":
   "Of course … what would you like to know?"

To give luck a chance:
   "Is there anything else?"

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# Encourage the Client to Talk

.. then listen to them _actively_.

"No-one ever listened themselves out of a job."

Calvin Coolidge, US President (1872-1933)

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# What do you really **DO** when listening actively?

As many answers as you like to the Chat please …

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# Empathetic Listening

- Using my own emotional apparatus in order to understand the feelings of my client
    - Must maintain a sufficient psychological distance
    - Empathy is not sympathy
- Advantages:
    - Allows me to understand what really matters to a client
    - Has a strong, positive effect on the relationship
- Requires an effort of imagination
    - I have to imagine myself in someone else's position
- Avoid 'making it about me'

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# Playback

- An indication that I understand will :
    - Allow the client to see if his/her message was understood.
    - Prompt him/her to offer additional information.
    - Demonstrate that I am listening.

- Need to understand both Facts and Feelings
    - My playback should cover both.

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# Playback Question

To revisit Question Types for a moment – a simple "and" gives
me an excellent way to combine Playback and Question. e.g:

- Customer: "Our current solution is working fine"
- Me: "So your current solution is working fine, **and** are you expecting to keep it for, say, the next 3 years?"
- …

- Customer: "Your router always leaves some sort of mess that I have to clear up by hand - it's very annoying!"
- Me: "The router result is not complete, which is annoying. **And** are there situations where it does complete correctly?"
- …

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# Unhappy Clients

- Withdrawn
- Touchy
- Sullen
- Impatient
- Sarcastic
- Won't listen
- Angry
- Blaming
- Threatening
- Manipulative
- Vengeful
- …
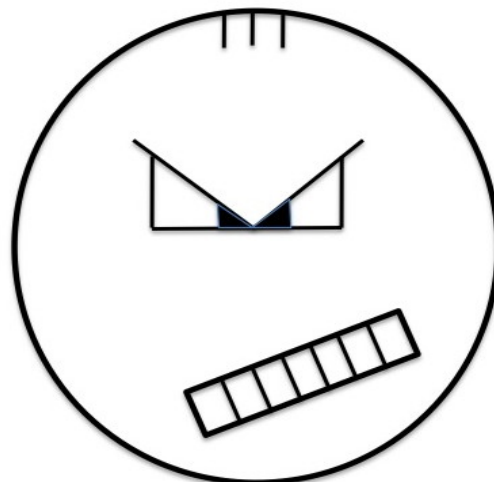
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# Dealing with Irritation and Anger

- Techniques associated with Discovery are key!
  - The need to question
  - The need to listen
  - The need to empathise
  - The need to playback/reiterate

- On listening ..
  - Concentrate *very hard* on listening
    - Don't search for solutions, reasons, justifications, etc
  - Be particularly aware of non-verbal clues
  - Separate facts from feelings (each is as important as the other)

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# Irritation and Anger: Timing

- Beginning
  - Assume they have good reason to be unhappy
  - Sincerely state an intention to help … *DISARM THEM*
  - Avoid 'but' … or any words that inflame

- Middle
  - Wait for dips in anger waves before speaking

- End
  - Discuss and agree next steps
  - Apologise, but only if appropriate
  - Be careful not to make expensive promises!

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# Learning Check

- Time spent on planning is wasted since plans can rarely be followed when contact is made with a client.

- You should use Discovery techniques during client encounters, especially in the early stages.

- When facing an unhappy client you first reassure them that, no matter what the problem or who is at fault, you are there to help.
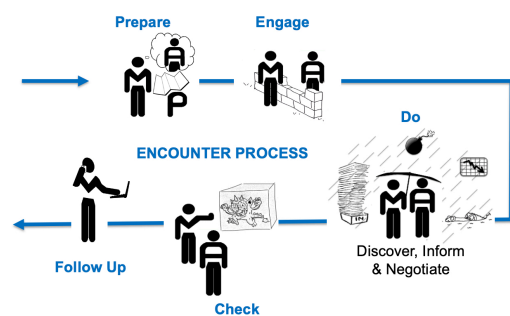


never        rarely        sometimes        usually        always

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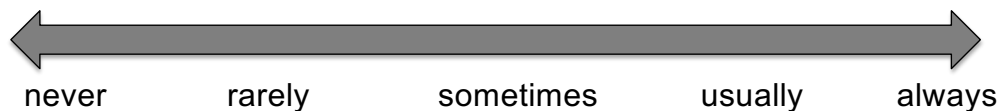
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# Wrap up on Plans and Learning Discovery

- Plans: the value is in the NING !

- Engage: Sync up then transition with PAGE

- The "Do" step starts with Learning Discovery

  – Vary your questions to get good coverage

  – Listen actively and Playback  (factual, emotional)

  – Use the same techniques in special situations … with extra care



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