



Building Stronger Partner Relationships

A 12-Month Strategy Checklist

<p>SUMMARY: What 3-5 things are we going to do over the next 12 months to improve this relationship?</p> <p><i>Do not fill out until AFTER you've completed the rest of this form.</i></p>	<ol style="list-style-type: none"> 1. XXXXXX 2. XXXXXX 3. XXXXXX
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PROGRAM OVERVIEW

<p>Customer Summary <i>What products do they use? How long have they been a customer?</i></p>	
<p>Customer Profitability <i>MRRs, opportunities for deeper relationship, more seats</i></p>	
<p>Contract Situation <i>When does their current contract expire? Do we think there's a competitor?</i></p>	
<p>Customer Expectations <i>What have we promised them? What do they expect us to provide in the future?</i></p>	
<p>Success Stories <i>How have we helped them improve their results or communications?</i></p>	
<p>Peers <i>Current Clients or Prospects</i></p>	
<p>Special Treatment <i>Anything unusual that we do for the customer (e.g., XX hours of product support) that we don't do for everyone?</i></p>	
<p>Last Meaningful Contact <i>Not weekly update e-mails. Face-to-face or program-related interactions</i></p>	
<p>Summary of Relationship <i>Is each side happy with the situation?</i></p>	<p>Customer Perspective:</p> <p>Our Perspective:</p>

CLIENT INFORMATION

<p>Pain Points <i>What are the problems we've solved or could solve? Are we asking about other areas of the organization? Do we ask every time we talk to them?</i></p>	
<p>Key Contacts <i>Who is our day-to-day contact? How strong is that relationship? Who is the decision maker? What's our relationship with places like Vendor Management/IT?</i></p>	
<p>Senior Manager Relationships <i>Do we have other relationships within the organization?</i></p>	

Hot Buttons <i>What do we need to be careful about? Any phrases they don't like? Any bad experiences with us or people within the organization who don't like us?</i>	
Budget <i>Do they seem to have the ability to expand the relationship? Have they expressed any concern about reducing their spending?</i>	
Other Partners <i>Do they have relationships with other companies that might want our part of the business? Any we might want to work with?</i>	

ACTION PLAN (Include Timetables for Each Area)

Interpersonal Relationship Building <i>Any bonding opportunities? Can we build a coach relationship, introduce a senior manager, or deepen the relationship with our primary contact?</i>	
Organizational Relationship Building <i>Can we meet people who aren't using our software or involved with our program, or deepen relationships with other critical business areas?</i>	
Impact on Key Areas <i>Can we improve the relationship (e.g., education, tips on using our product)?</i>	
Impact on Other Areas <i>Can we deepen the overall relationship?</i>	
Products That May Interest Them	
Opportunities for Sharing Their Story <i>Testimonials, Case Studies, Blog Posts</i>	(See Success Stories)

STRATEGY AND TEAM

Top 3 Strategic Goals for <Partner>	1. XXXX
How Will We Accomplish These Goals? <i>Be specific.</i>	
Three Month Goals <i>What are our short-term goals?</i>	
Six Month Goals <i>What are our intermediate goals</i>	
Alternatives to Our Primary Goals <i>What "other" things we might want?</i>	
Upcoming Visits <i>Do we want to invite them to visit us? Go to their location? Meet up at a conference?</i>	



Contact Peter Osborne at peter@frictionfreecommunications.com to discuss how I can work with you on customizing these or other negotiations tools and content to drive more sales faster.

You can also bookmark <https://www.frictionfreecommunications.com/resources> for new tools.