



36 Reviewing customers' needs

What do customers need?

The reason a person became a customer of yours the first time may not be the same reason that they continue to buy from you in the future. Existing customers have changing needs the same as any new potential customer would. They need ongoing understanding and communication.

Why is understanding them important?

Taking the time to understand what your existing customers' changing needs might be will ensure that you are right there with answers before they think of using anyone else. It is important that you keep talking to your customers as they are a great source of information for you. Their changing needs can be representative of market demand which could influence the longer term development plans for your product or service. Taking the time to find out what your existing customers' needs are likely to be in the future could give you business development ideas. Taking your existing customers' business for granted without reviewing their needs could be dangerous. Do they know about the full range of products and services you offer? If not they could be attracted elsewhere if someone new comes along with an answer to a problem you didn't even know about. You could be missing out on new business opportunities with existing customers.

Your challenge

You will need to introduce a system for reviewing your existing customers' ongoing and changing needs. Your system will need to fit with customers' schedules, your resources and will need to produce feedback that you are able to action in the appropriate way.

What are the key elements of a successful review?

The right approach

It is important to use a customer review opportunity to build on your existing relationship. Your customers are busy like you and will need to be given a good reason to spend the time reviewing their needs with you. So your approach is key. Just inviting your customer for a long lunch without setting up the reason for that

lunch is likely to waste both your time and theirs. You have to give them a reason to meet you. The review meeting could be set up as a form of regular free consultancy, where you follow a distinct structure looking at the past, present and future.

The right time

It is a good idea to set up the expectation of this with every new customer. It could become part of your commitment to your customers when you start your relationship. Your review meetings need to be set at a time that anticipates any changing needs your customers might have. This might be annually at the end of their financial year, or end of the year. It might be biannually. It might be seasonally. Each business and customer relationship may differ. The time needs to be right for both parties.

The right preparation

To successfully review your customers you will need to have full details of their purchasing history with you. You can anticipate some future needs based on past patterns. Taking the time to find out a little about their marketplace and industry may also predict some future needs of which the customer themselves might not yet be aware. You will need to have available a list and/or samples of the work that you have completed for them.

The right questions

Your review will need an outcome and an action plan both of which can be achieved with the right questions guiding the review. Here is a list of some questions that you might like to incorporate into your customer reviews.

- What do you want to achieve at our review meeting?
- How happy/satisfied have you been with the service/product we have provided for you over x period?
- What, if anything, could we improve on?
- In terms of the services we offer, what is most important to you?
- What are some of the problems you anticipate might need solving in x area over the next year?
- What is your focus for the next six months to a year?
- What are your priorities?
- How could we help you over the next 12 months?

An action plan and new proposal

It is important to have an agreed action plan at the end of the review which could be confirmed by a review proposal for future business. A good structure for a review proposal is as follows:

- introduction
- summary of achievements over x period
- your feedback
- your aims for y period
- suggested solution/proposal/follow up
- price
- next step.

Create yourself a template that you can adapt for use with all your customers. This will save you considerable time and effort.

YOUR REVIEW – SPECIAL RESPONSE CHECKLIST

- ▶ Who are you going to review? – make a list.
- ▶ How are you going to approach it? – what is in it for your customers?
- ▶ Decide on a timescale for completing your reviews and set a deadline.
- ▶ What is your aim for each review?
- ▶ How are you going to structure your review? – what questions do you need to ask?
- ▶ Have you done your preparation? – can you anticipate any future demand or needs?
- ▶ What information do you anticipate each customer will want to know about your new products and services? Do you have that information to hand?
- ▶ Have you got a proposal template to use for following up reviews?

How to use this information

If you do decide to review your existing customers' needs in a structured and focused way, it will be useful to measure the outcome noticing the impact that it has on your business.

***Think customer review and build
more business for the future***