



## Why Do You and Your Clients Need to Meet More Often

Most of us have a service delivery flow that goes something like this.

**Step 1:** We listen to our client's request/need/problem

**Step 2:** We create the right deliverable that checks the boxes

**Step 3:** The client is pleased with the outcome

**Step 4:** We go on to the next thing in the queue

**Step 5:** \_\_\_\_\_

How often do we do include step 5 in our flow?

## Imagine This All Too Likely Scenario

Put yourself in your client's seat for a minute with a situation you might have experienced.

It's business insurance renewal time again. After careful product comparisons, you and your broker walk away satisfied you have the best coverages and premiums for your current needs.

Your business is booming. During the policy term, you open two new locations, expand your product offerings, dump unprofitable services, and -- unknowingly -- assume a risk exposure that isn't covered by your policy.

A year later when the next renewal rolls around you enthusiastically share your business expansion successes with your insurance broker.

# Leading the What's New That We Should Talk About Meeting



Surprise. You're faced with a hefty premium audit adjustment, and the (even more) unfortunate news that your policy doesn't cover your expanded operations. You are understandably angry, your broker is embarrassed, and you take your business to another broker.

All of this could have been avoided with a regular, conversational client checkup. A few thoughtful, strategic questions from time to time not only keep the relationship on course but uncover potential opportunities for both of you.

## Tips for a Meeting You and Your Client Will Appreciate

1. **Reflections:** Can you share a few of the recent achievements or milestones your business is most proud of?

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2. **Looking Ahead:** What are some of the primary goals you want to achieve in the next 6 months?

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3. **Organization:** Have there been any significant changes in your company's leadership, structure, or key team members since our last meeting?

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4. **Growth:** Are you planning any mergers, acquisitions, or new ventures in the coming months?

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5. **Challenges:** Are there any new challenges you've encountered since our last meeting that you can share with us?

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6. **Market Trends:** Have you experienced any shifts in your target market or customer base? Was this planned? Are there any trends you're concerned about or interested in exploring?

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7. **Upcoming Events:** Are there any seasonal impacts, upcoming events, or industry changes that you foresee?

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8. **Innovation:** Are there any new products, services, or markets that you're planning to explore or introduce soon?

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9. **Stop Doing:** Are there any current products or services that you plan to discontinue?

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10. **Changes in Needs:** Have your technology needs changed as your business has grown or evolved in recent months?

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11. **Work Policies:** Are there any new work from anywhere or hybrid work policies that have been implemented?

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12. **Day-to-Day:** Have you encountered any challenges, frustrations, or bottlenecks in your day-to-day workflows or processes?

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13. **New Technologies:** Have you implemented or plan to implement any new technologies, apps, software, or systems?

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14. **Feedback on Services:** How are the services we're currently providing aligning with your business needs? Is there anything that could be adjusted for better alignment?

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15. **Customer Feedback:** Have you received any feedback, positive or negative, from your customers about your support?

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16. **Resource Planning:** Have there been any changes in your internal team or outsourced providers that we should be aware of?

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17. **Security Concerns:** With the evolving landscape of cyber threats, are there any new security concerns or data privacy requirements that we should discuss?

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18. **Compliance and Regulations:** Are there any upcoming regulations or compliance requirements that might impact your technology usage or business operations?

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19. **Technology Utilization:** Are there any technologies or tools that you or your employees feel aren't meeting business needs as well as they should?

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20. **Budget Planning:** Have there been or do you anticipate any budget changes that might impact your technology investment plans?

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21. **Partnership Evaluation:** How do you feel about our current partnership? Are there areas where you think we could contribute more toward your strategic growth?

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22. **Long-term Vision:** How do you see your business evolving over the next few years, and how can we best support your growth?

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## Wrapping It Up

Remember, the goal is to have an open and conversational dialogue, so feel free to ask follow-up questions and encourage your client to share any relevant information that could help you align your services with their ever-changing needs.

### A Friendly Reminder

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