

#### 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
<b>Step 2:</b> We create the right deliverable that checks the boxes
<b>Step 3:</b> 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.

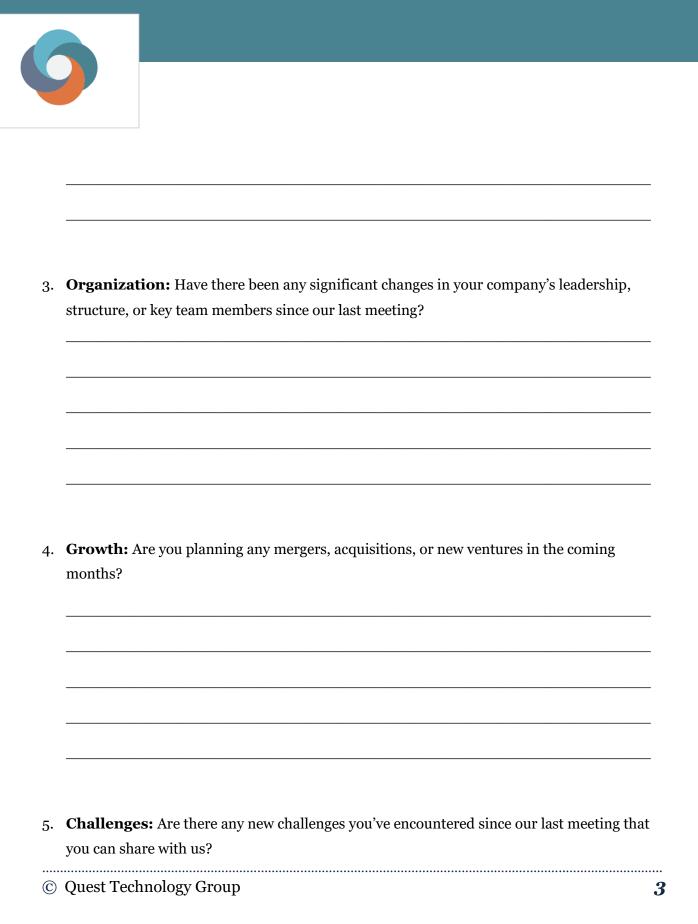


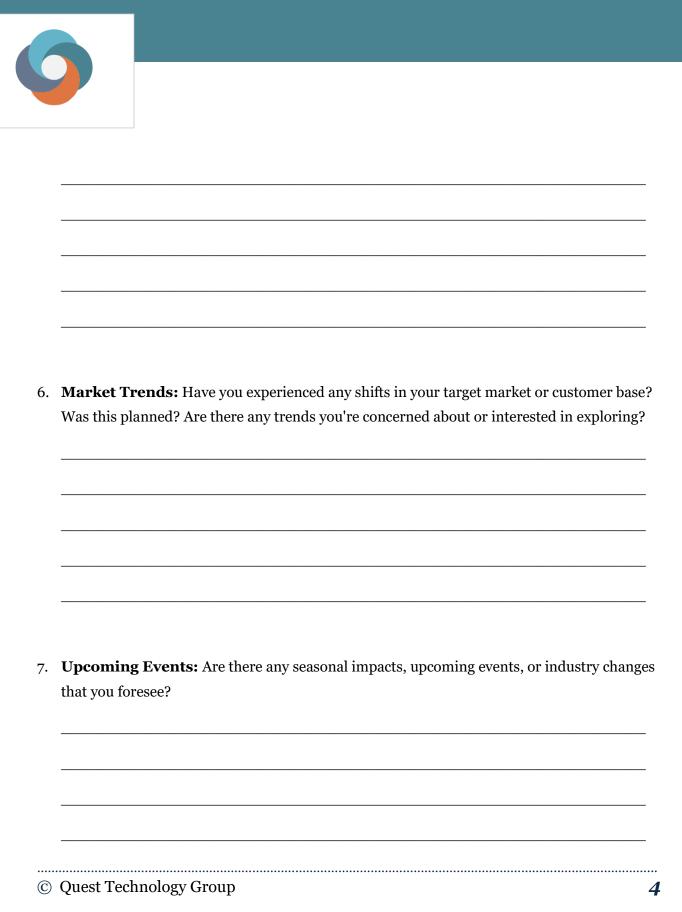
Surprise. You're faced with a hefty premium audit adjustment, and the (even more) unfortunate news that your policy doesn't cover your expanded operations. You are understandably angry, your broker is embarrassed, and you take your business to another broker.

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

•	<b>Reflections:</b> Can you share a few of the recent achievements or milestones your business i most proud of?
	<b>Looking Ahead:</b> What are some of the primary goals you want to achieve in the next 6
	months?

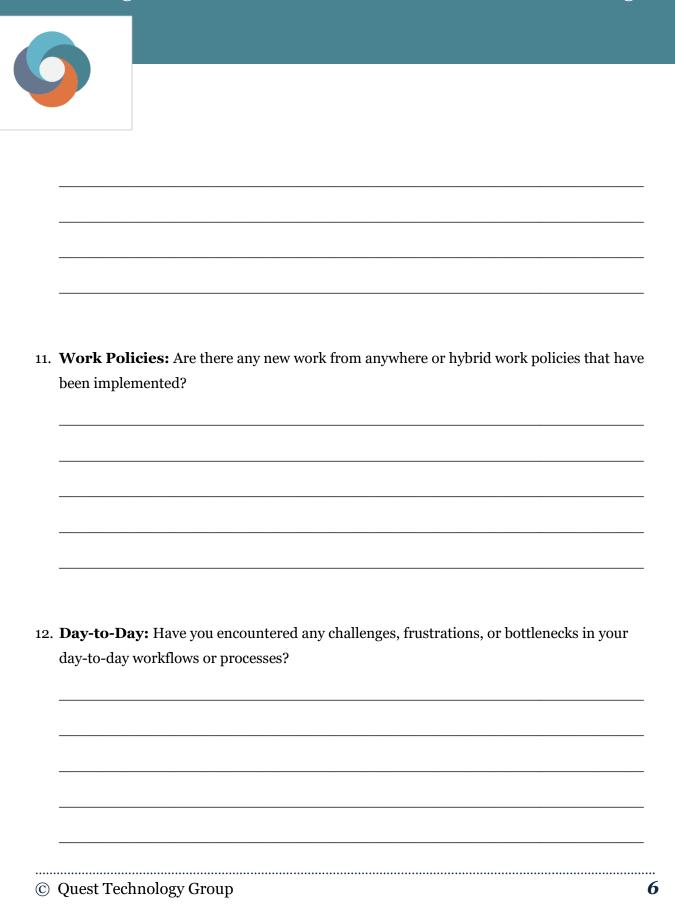






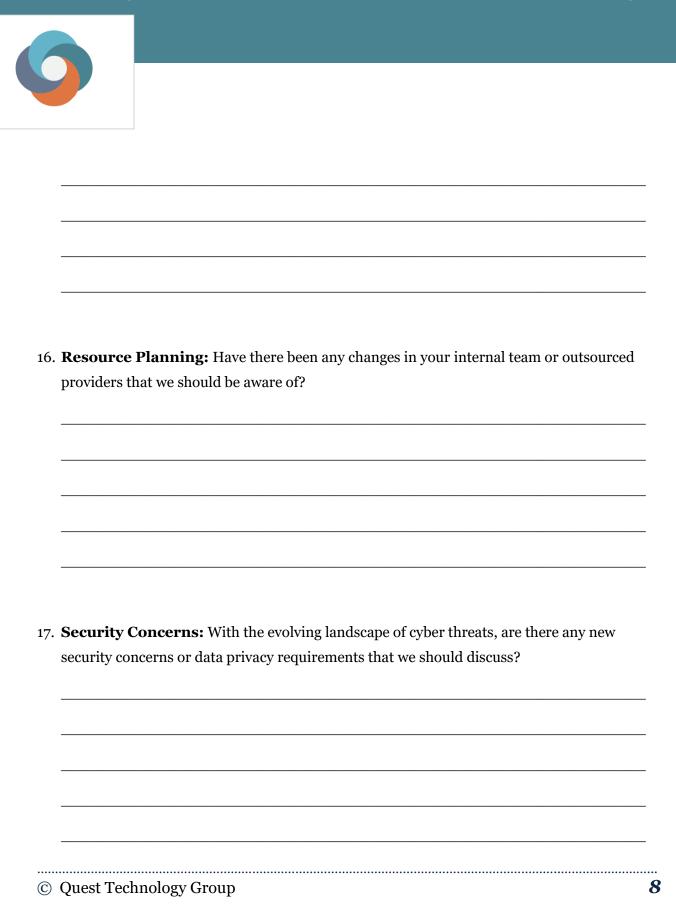
8.	<b>Innovation:</b> Are there any new products, services, or markets that you're planning to explore or introduce soon?
9.	<b>Stop Doing:</b> Are there any current products or services that you plan to discontinue?
10.	<b>Changes in Needs:</b> Have your technology needs changed as your business has grown or evolved in recent months?
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13.	New Technologies: Have you implemented or plan to implement any new technologies, apps, software, or systems?
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?
15.	Customer Feedback: Have you received any feedback, positive or negative, from your customers about your support?
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8.	Compliance and Regulations: Are there any upcoming regulations or compliance
	requirements that might impact your technology usage or business operations?
9.	<b>Technology Utilization:</b> Are there any technologies or tools that you or your employees feel aren't meeting business needs as well as they should?
Э.	Budget Planning: Have there been or do you anticipate any budget changes that might
	impact your technology investment plans?
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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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