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Connecting with your clients requires a personal touch

By VALERIE WILLIAMS
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It's 2:30 on Monday afternoon. A client calls and asks whether you've looked at the RFP she faxed over lunch. You stare at your overflowing in-basket, and what do you do? You start sorting through the pile and suddenly stop when you come across a small, handwritten envelope. You tear it open and begin to smile, enjoying a 60-second break while you read the personal note inside.

Consider how one of your clients might react to this card in the same situation.

That question was posed to several marketers attending a recent roundtable discussion by the Society for Marketing Professional Services. Janet Sanders, president of the Clayton Consulting Group in St. Louis, Mo., and a long-time advocate of SMPS led the discussion, "Care and Feeding of the 800-Pound Gorilla: Building Relationships and Cultivating Clients by Mail."

Editor's Note:

This column is the first in a bimonthly series written by members of the Society for Marketing Professional Services. Marketing Insights blends the observations and advice of seasoned marketing professionals in the architecture, engineering and construction industry. Suggestions about topics for future columns are welcome and can be e-mailed to annu@djc.com.

Do personal notes work?

One of the participants at the roundtable, Amy Petri, the director of business development of Waterleaf Architecture & Interiors, claimed that a personal note she sent after an interview for her current job helped her land the position. Her boss still has the card framed on his desk. Why? Because the picture on the card related to one of his personal interests.

Another example: When visiting a Houston firm recently, Sanders noticed "Alice in Wonderland" figurines in her prospective client's office. After the meeting, Sanders sent a unique "Alice in Wonderland" card she bought in London a year ago, one of 300-plus cards she collects for these occasions. Five minutes after opening the card, the client e-mailed Sanders: "You must be an incredibly perceptive person to notice I liked Alice in Wonderland. Your card was great! Let's talk soon about our next project." Sanders was going to send her a thank you anyway, but the card offered an entry point and a chance to make a connection with a sought-after client.

Thank you's, congratulation notes, clippings of articles with a post-it note, cartoons -- all should be part of the arsenal for personal communications with clients.

If you're wondering whether your note will get read, even for those whose in-baskets are overflowing will dig through the mail and look for the fun stuff first. "I look for small, colored envelopes and especially those that are hand-addressed," said Jan Flesher, marketing director of CDi Mechanical Engineers and president of the Seattle chapter of SMPS.

Again, this is proof why mail is so positive, said Sanders, especially if it's personal.



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Gayle Guadarrama, corporate marketing director Guadarrama of GeoEngineers, pointed out that some may feel they are crossing a professional or personal line by sending personal notes. Good! "There's clear research and testimony from clients that they like having both relationships," Sanders said.

"If there is no personal part in our professional lives, we are really living deprived lives," she said. "When you can combine your work with relationships that touch another dimension of your life, that makes for a fuller life. It's valuable for us and your clients feel the same way." Add to the fact that letter writing in general has become a lost art. Petri remarked that personal note is "increasingly rare and so welcomed because it is unusual."

Flesher added that internal thank you notes are also welcomed. It's great to give recognition to the team after a big project, but it's even better to put it in writing so it goes into their employee file. "Those kind of thank you's helped advance my own career," she said.

"High alert" clients

One of the challenges is to categorize your client list. Everyone agreed that developing a program to contact each client every two months is a set-up for failure. "It lacks spontaneity and becomes rote and ritualized," said Petri.

Sanders suggests that each of the principals and marketing people should have no more than 10 "high alert" clients. "Your goal is to keep your antenna tuned for your individual client's likes and dislikes and hot buttons," she said. Posting your list in a high visibility area also helps you to remember those people and keeps them alive.

Training + practice = spontaneity

Petri constantly looks for opportunities to send something in the mail. "I think it stems from my mother who encouraged me to write thank-you notes when I was child."

Triggering a spontaneous response requires training, offered Sanders. "I believe in the E-R format: Education and Reward. Since most don't have note writing in their bag of experience, she recommends offering a brown bag workshop called "Professional Courtesy."

If anybody entertains you, expends any effort or expense on your side, Sanders said it is "rude, crude and socially unacceptable if you do not send a written thank you." Those are the rules. Then she gives them formulas for writing notes that are brief, personal and of value.

"Instilling a client consciousness also inspires spontaneity -- especially if you do it in a fun way," Guadarrama said. Signs abound at her office: Marketing is everyone's business. Have you hugged a client today? Have you shown some appreciation to your client lately? These remind staff to connect with clients on a personal level in a low-key way.

Think "sandwich," offer tools

All in the group have had experiences with management and technical staff who have struggled for days to write a three-sentence congratulations note. "It's that fear of imperfection," said Flesher.

Guadarrama agreed that it's hard to overcome "especially when everything else they do for the firm is in the technical mind set."



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That's why Sanders suggests the "sandwich" concept for writing personal notes. The first sentence is about them. *"Thank you so much for the blueberry muffins."* The second is about you: *"Fresh blueberries are so hard to get in St. Louis this time of year."* The third goes back to them: *"Your thoughtfulness in treating me to the muffins was really appreciated."*

Sanders also suggests that no sentence begin with "I," "we," "our," or the company's name.

Marketers have to be careful not to help too much when writer's block happens, Flesher advised. It's important that the note reflect the person's "voice."

For those who prefer to type their personal notes because their handwriting is poor, Sanders said: "Do something about it!" It's a habit that can be changed and is not a good excuse anymore.

Providing the tools to make it easy to write a note can make a key difference. "Our firm has postcards that are part of our identity package," said Petri. It's easy for staff to pull one of these quickly and jot a note if cards are right by the phone.

Sanders recommends collecting cards and clippings for unique occasions. For those who are stymied about types of cards to send, sometimes humor is the best option. Flesher uses Weimaraner cards when she doesn't know person very well. "Most people learn early on that I'm a light-hearted person, so it lends to the voice of the note," she said.

What about e-mail, seasonal mailings and gifts?

Even though e-mail is good for business, it's not the same as a personal note, Sanders warned. "Be aware that what you write in an e-mail has a totally different tone and is not personal when the person is included on a long list of cc's."

Guadarrama's firm sent a couple of fun, e-mail holiday messages that were done early before people started sending cards on the Internet. "Those were received well by clients," she said, "but staff still wanted to send out holiday cards because they felt that we would be the only firm that didn't send one to clients."

Using that as a reason to send out unsigned mass holiday cards should be evaluated carefully. Sanders suggested that firms may want to spend their efforts and dollars on personal notes to clients on an unexpected and more frequent basis.

Also be aware that gift giving can be a tricky business, advised Sanders. "People don't like candy from strangers, even if it looks like good candy." That's why Sanders believes that "gift giving does not create a relationship." You need to first have a relationship and then gift giving becomes more comfortable.

Are they happy?

"That's what the principle here is," summarized Sanders. "Make your client happy for 60 seconds during their day, so that they want to get another message from you."

Don't forget to save your client's cards, added Sanders. "It tells you somebody read it, thought about it, had a positive reaction and acted." It's tangible evidence of your relationship and you don't want to throw it away.



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Tips on maintaining client relationships

Personal mail is positive: Phone calls interrupt, but people choose when they read their mail and thus are more open to the message. When you're building relationships, it's more important to leave the other person with a positive "contact" memory than with a positive "content" memory. Make your message brief, personal and of value.

Send them what they'll like: What do people like to find in their mail?

- Thanks. Let them know you appreciate the time, advice, cooperation, or whatever they may have shared with you.
- Congratulations. Tell them "Way to go!" whenever you see something good about them, their company, their family or their projects in the paper.
- Send them clippings, reprints or any other material relevant to their business, hobbies or interests that they might not find on their own but would find interesting.
- Smiles. If you feel comfortable sharing something funny with them face-to-face, send them a cartoon or ad or article that you think they'd smile at.

Use the right tools: Create a good balance of personal and professional by combining corporate stationery products with your own handwriting. Typed messages look more formal, and if they're less than three or four sentences they look skimpy. You can use letterhead, but corporate memo pads, stick-on notes and business cards are perfectly appropriate for this kind of contact.

Strike the right tone: Write the way you talk. When they read your message they should hear your voice. Don't worry about writing complete sentences or using perfect punctuation. Use phrases and sentence fragments. Real people sound that way! Keep the message light and breezy, not heavy and long-winded.

Don't put yourself first: As a rule of thumb, never begin with words like "I," "We," "Our" or the name of your firm. Your written message will have more focus and impact when it features the other person's interest.

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