THE ROAD TO GROWTH

Skill & capability building for personal & professional success

- Objective of this master version of trainings (growth – personal & business)
- Elements of growth (win new + grow existing business)
- Relate trainings / skills to each (= TOC) - @ point of first introduction
- Relationship journey as the double-click on this two-step process (introduce skills / capabilities throughout)
- Go through each of the two steps (and sub-steps within each, with related frameworks / exercises)

To be finalized

Why are we here?

- Build a **unique global marketing capability**
- Develop highly **effective global marketing consultants** in order to deliver on our promise
- Creating a **common culture, language and approach** to how we think about, interact with and develop relationships with our clients
- Build a **strong sense of a local team** within the global context

Growth

for our business & our people

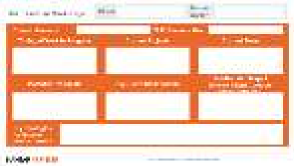
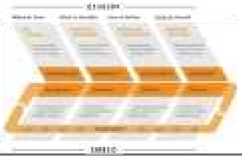
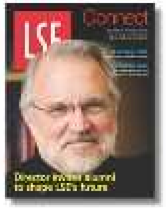
Business growth comes from two sources

\+

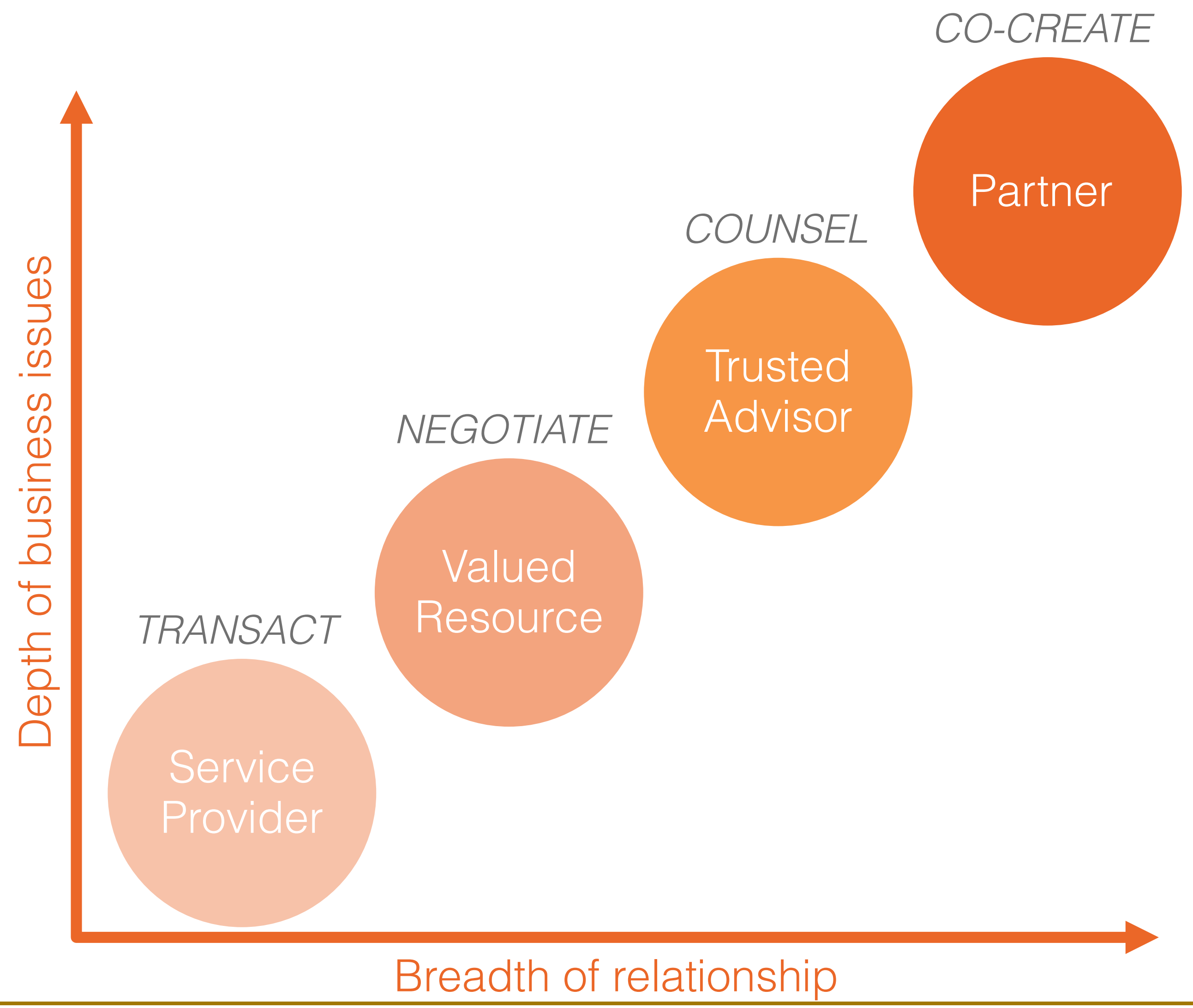
=

- These are **ALL** of our responsibilities
- We have to **make time** for them
- It's about **daily action**

This growth will come in part through specific actions we can all be doing every day…

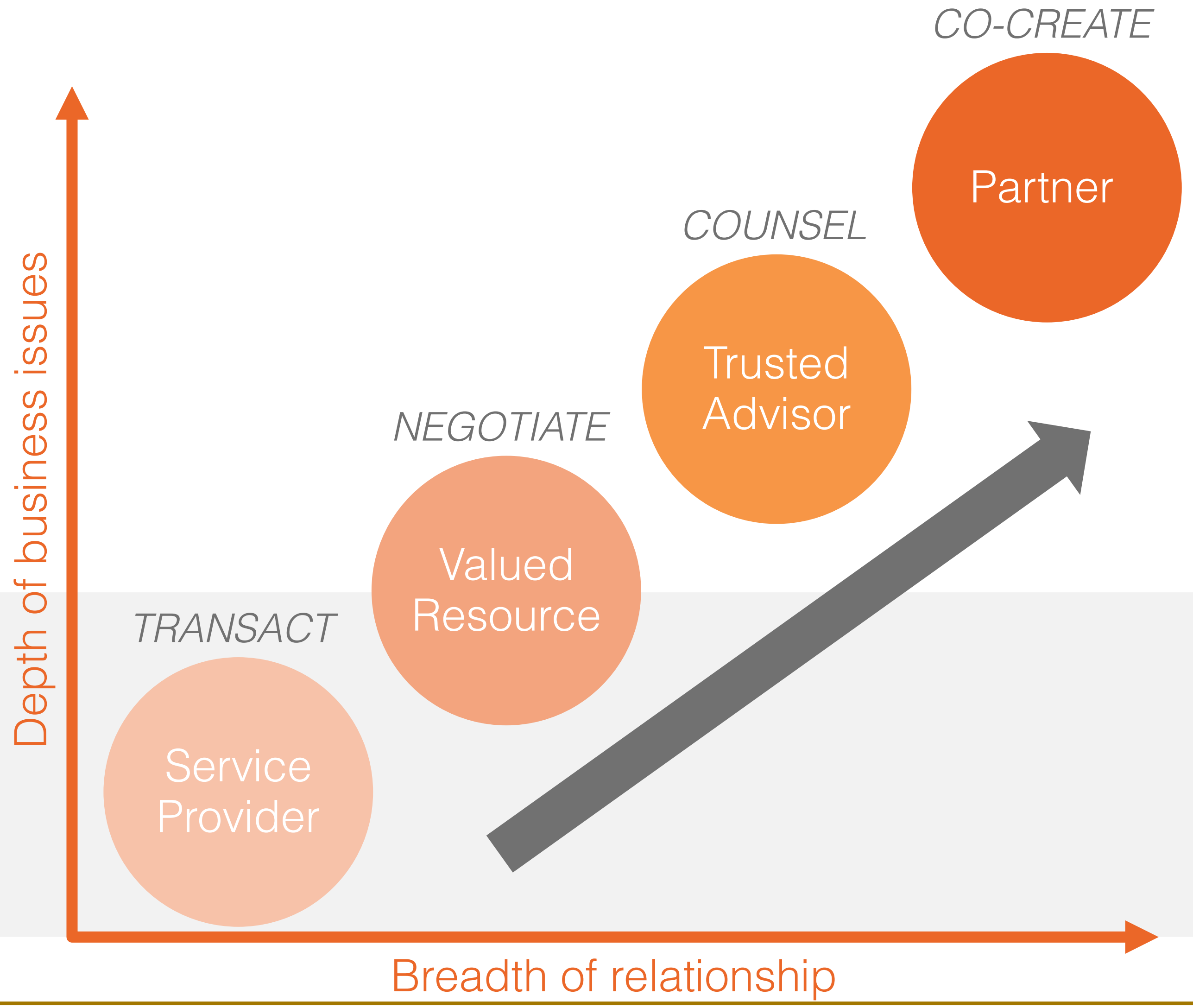
Our day to day client relationships	Everything starts with the Client Strategy 	Add value for free & stay top of mind 	Full Kantar Proposition (Roadmap & Practices) 
	Hallway pass – find time to hang out in their offices	Arrange for Stewardship Meetings 	Keep in mind: **Adding Value NOT Selling** **Making the client look good**
Foot in the door for NEW new business	Networking 	Alumni or other organisations 	Social networking 

…but the long-term success of our relationships is rooted in the strength of our relationships



To become trusted advisors and true partners, we need to go beyond the basics

Key skills and capabilities



The Bonuses

1. Active listening & asserting
2. Discovery questions
3. The Central Question
4. Embracing fear
5. The 3Cs
6. 4 paths to relationship growth
7. Feedback model

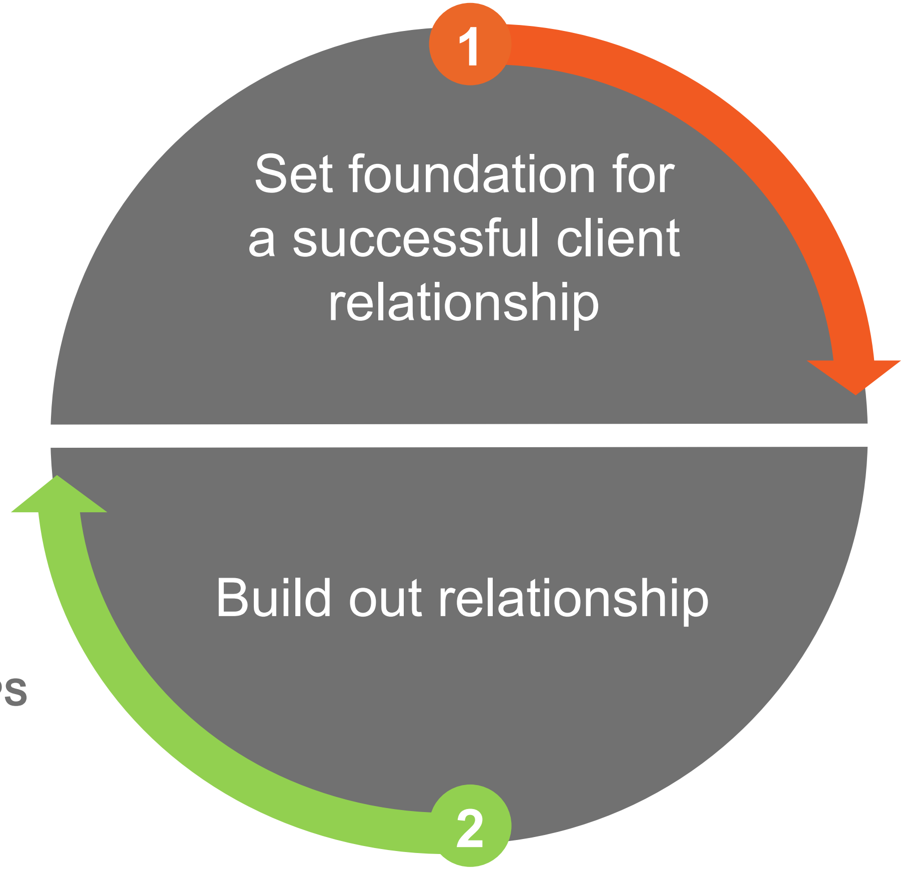
The Basics

1. Preparation
2. Running productive meetings
3. Conflict resolution

At the end of a project,

what do clients remember **most**?

The objective of this training is to foster a proactive approach to client development



- ✓ BUILD TRUST
- ✓ DEFINE ROLES
- ✓ CRAFT AN EXPERIENCE

- ✓ BE A TRUSTED ADVISOR
- ✓ STRENGTHEN RELATIONSHIPS
- ✓ DELIVER THE EXPERIENCE

We are keepers of the overall experience

We must be known for delivering impact to the client – and in a way that fits with their ways of working

The Client Experience Aim is...

How you want the client to describe working with you – be specific!
Think of service brands you value and what makes them special for you.

Which means we will capture growth of…

Relate your end deliverables to their business KPIs.

Which will engage our clients by…

Think about your clients and their 'me' agenda, and build into the way you work / the experience you create (e.g. thought leadership and breaking new ground).

And will motivate the team through…

Connect what you are doing for the client to the benefit for people on your team so they know the value of what they are working on, and how they pay a role in delivering a great client experience.

Setting the foundation for a positive and memorable experience

Attitude & mindset

Clarifying roles

Creating the right strategy with the right prospects

First impressions

A successful, enduring relationship is rooted in *trust* from the start and *impact* over time

- Attitude

TRUST = Credibility + Reliability + Intimacy ÷ Self-orientation

IMPACT = Insight + Resourcefulness + Accountability ÷ Fear

- Attitude

Building trust is at the heart of what we do – think "customer experience"

$$\text{TRUST} = \frac{\text{CREDIBILITY} + \text{RELIABILITY} + \text{INTIMACY}}{\text{SELF-ORIENTATION}}$$

CREDIBILITY	How well do I understand the client's business? How strong a presence do I have as a peer of my clients?
RELIABILITY	Does my client believe I will deliver what I commit to deliver?
INTIMACY	How well do I know my client and his/her business? How much does my client believe I care about him/her?
SELF-ORIENTATION	To what degree does my client believe I serve him/her versus selling WPP/me?

- Attitude

Self-Oriented Behaviors

- A tendency to relate the other person's stories to **ourselves**
- **Too quickly** finishing their sentences for them
- Filling **empty spaces** in conversations
- Speaking in order **to appear** clever, smart, knowledgeable, etc.
- **Not providing** a direct answer to a direct question
- An **unwillingness** to say "I/we don't know"
- **Reciting** your qualifications
- A **tendency** to give answers too quickly
- **Closed ended** questions early on
- Putting forth hypotheses or problem statements **before fully hearing** the client's hypotheses or problem statements
- **Passive listening**; a lack of visual and verbal cues that indicate you hear and understand your client

What mindsets underlie self-orientation?

What would it look like to be "other-oriented?"

- Attitude

Impact

IMPACT = INSIGHT + RESOURSEFULNESS + ACCOUNTABILITY ÷ FEAR

INSIGHT	Do I probe for deeper understanding? How much value do I contribute beyond the brief?
RESOURCEFULNESS	To what extent do I ensure the client sees the full benefit of WPP…and other partners who may benefit the client?
ACCOUNTABILITY	Do I own it? Does the client view me as an owner, as if their firm were my firm?
FEAR	Does the client see me willing to speak the truth, even if risky?

- Attitude

Examples of Fear-Driven Behaviors

- Failing to be **clear and concise**
- **Avoiding** of potential conflict
- **Not asking questions** to which you do not know the answer
- **Using only your domain** of expertise to view the client's situation
- **Holding back** from disclosing personal feelings, intuitions, and perspectives

- **Projecting** on to others uncertainties you have in yourself, resulting in arrogance and unsubstantiated judgment
- **Competing** with clients
- Shutting down, **withdrawing**
- **Satisficing**, doing the **minimum** needed to survive
- **Reluctance to say** / do something that will result in more work

- ROLES (THEIRS)
- MOVE ELSEWHERE? SCALING THE CLIENT

Who do we need to know?

Decision Makers

– Weigh all the available information and options
– Make the decisions

Decision Owners

– Take 'ownership' of the decision and is accountable for the results

Influencers

– Want to be involved / whom the decision makers like to involve:
  – Usually, if they say 'No' that means 'No'
  – It does not follow that if they say 'Yes' that means 'Yes'

Implementers

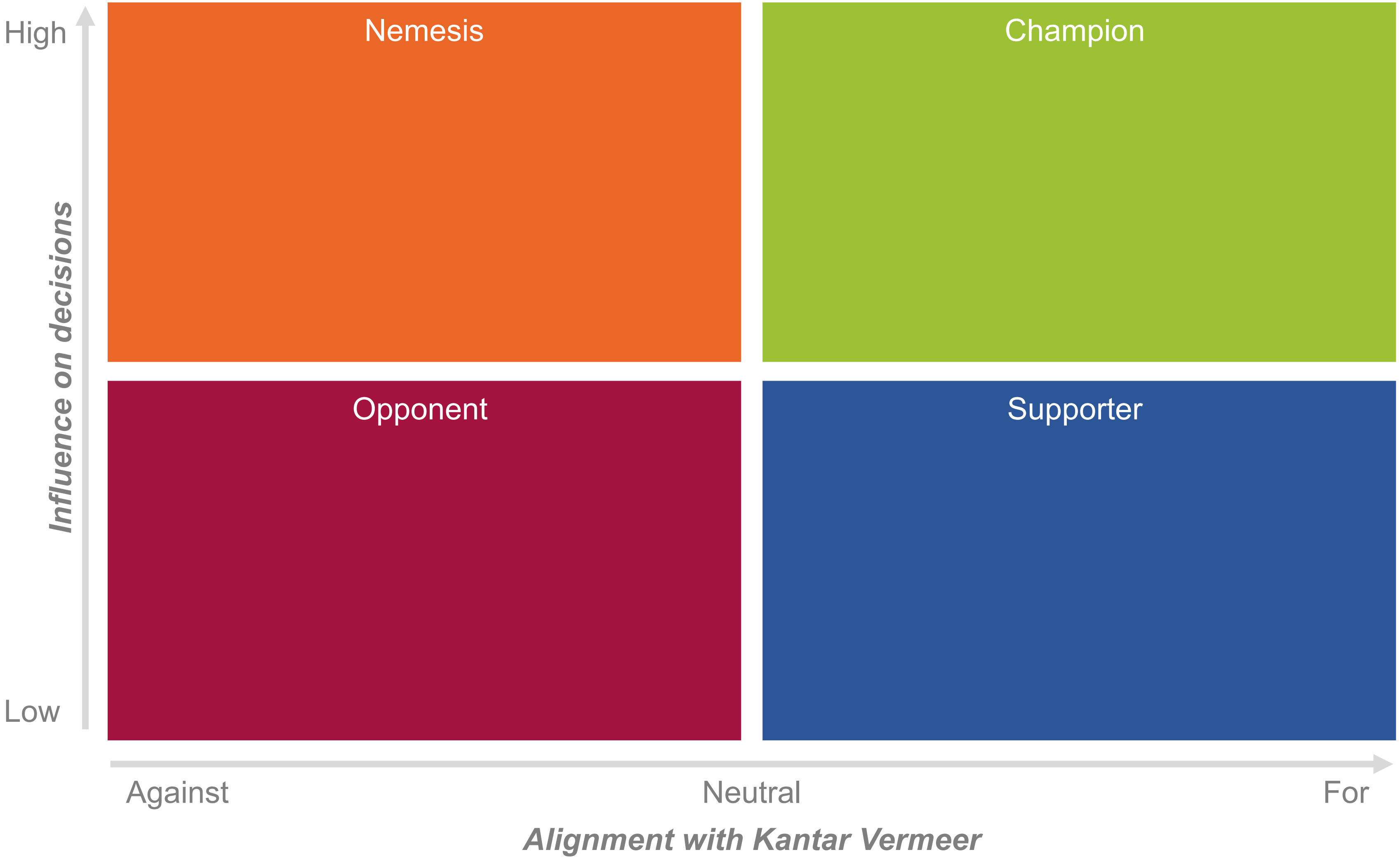
– Have to make the 'Yes' decision a reality

- ROLES (THEIRS)
- MOVE ELSEWHERE? SCALING THE CLIENT

Who are our stakeholders?

INDIVIDUAL EXERCISE

+ Plot individuals from the client organization based on their influence and whether they generally oppose or support you
+ Include the name of the stakeholder and their job role
+ Match Vermeer talent to key stakeholder (chemistry / fit)
+ Annotate individual(s) with primary responsibility / control over the budget / decision making



• ROLES (OURS)

To be effective in developing relationships, clients need to be clear about the ro we each play with them – this builds clarity, credibility and depth

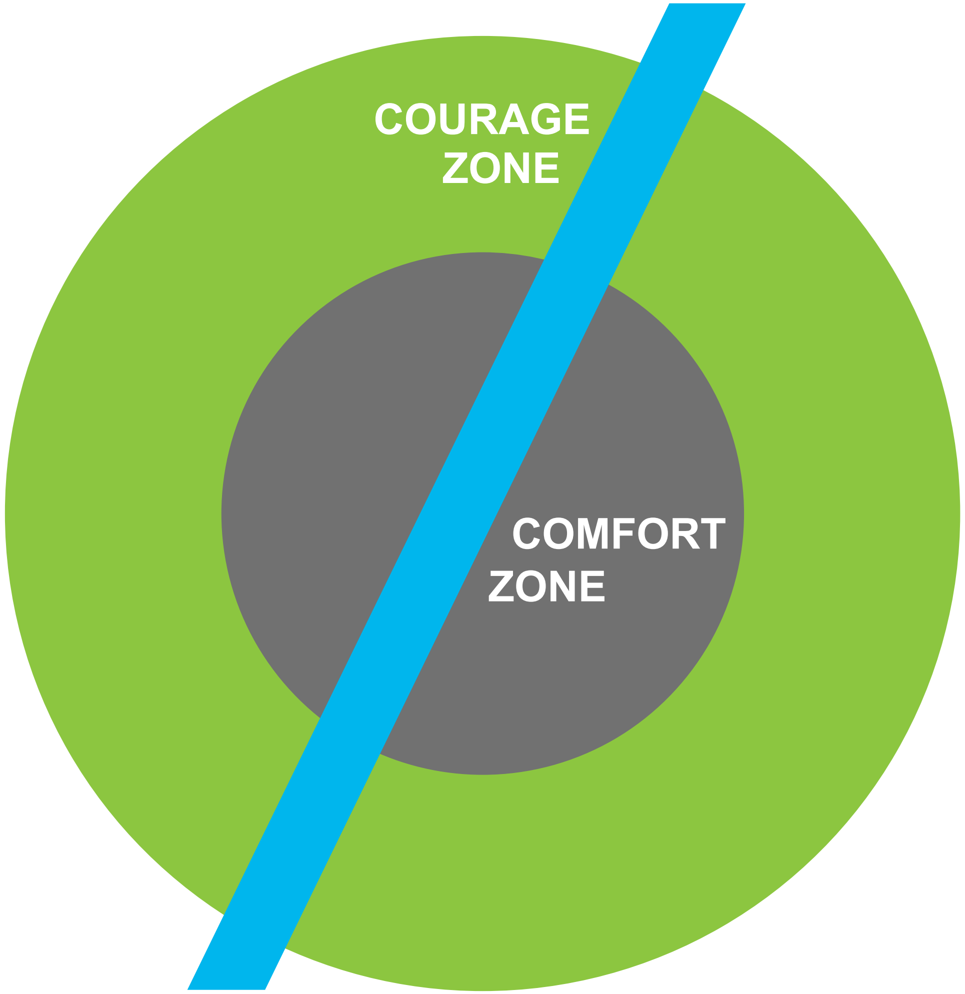
Role	Activities	Metrics
The Pathfinder	Meeting all / senior client and agency partners, volume and frequency of contacts	Proposal volumes, briefs, pipeline
The Backbone	Client management, project and team management, content ownership, project delivery	Client Satisfaction, preference, profitability, growth
The Specialist / Geek	Sector and client news, knowledge, thought leadership content	Client / sector knowledge, 'knows my business' expertise, visibility
The Promoter	PR, events, communications, creds.	Visibility, awareness, consideration, sales
The Organiser	Client info / contacts, project admin	Efficiency, team organisation

You can play two, but you can't play all roles with one client

Successful selling is more PULL than PUSH

Selling is a by-product of interesting conversations with your clients

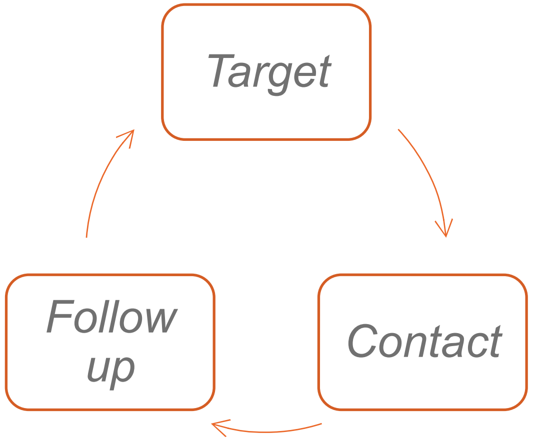
Finding the opportunity often requires going out of your comfort zone



- SPECIFICS
- New business basics: your everyday role

New business is a funnel

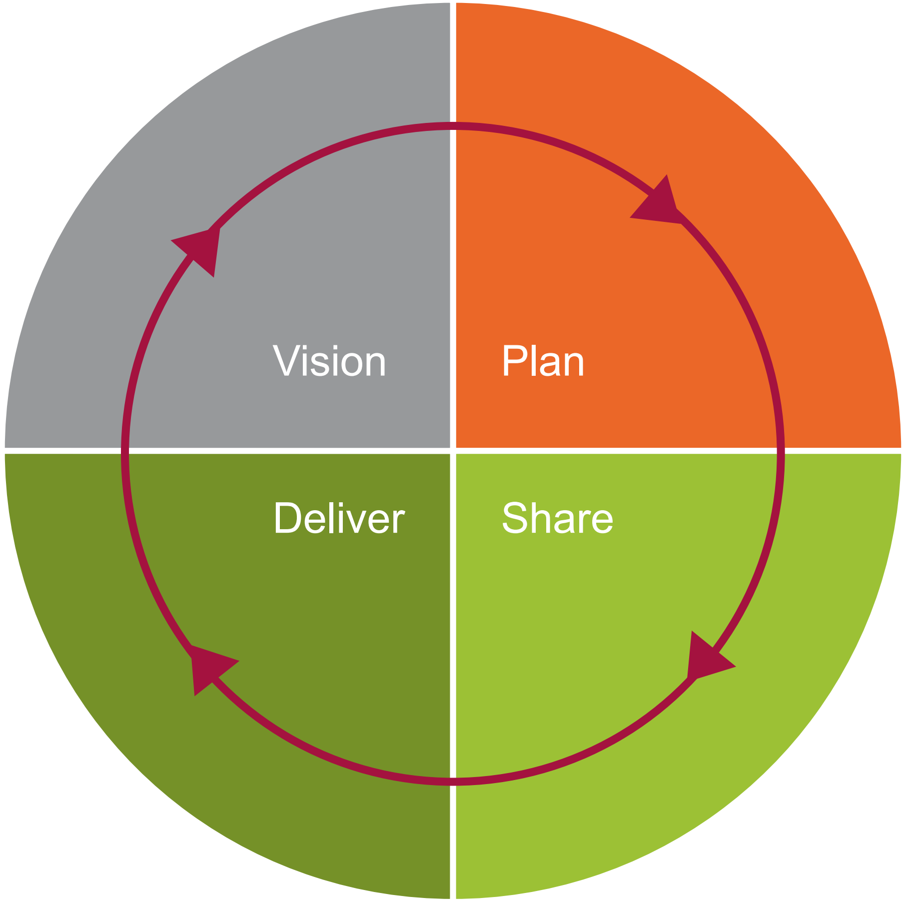
- Success comes from strategic targets and a structured approach
- It's a numbers game: it requires daily action
- A simple cyclical process



KANTAR VERMEER

Your clients already have a plan – get your team involved in it!

Understanding client business plans will help identify related issues we can help solve



- Credentials meeting

The First Meeting – Preparation

Frame the Situation

Casting

Using the Sales Deck

Sparring

- Credentials meeting

The First Meeting

Use the Company Briefs, Data for All and Linked In to understand the brand, the business and the category

Use the Central Question framework to capture, frame and sharpen your thinking

Preparation for a first meeting is key

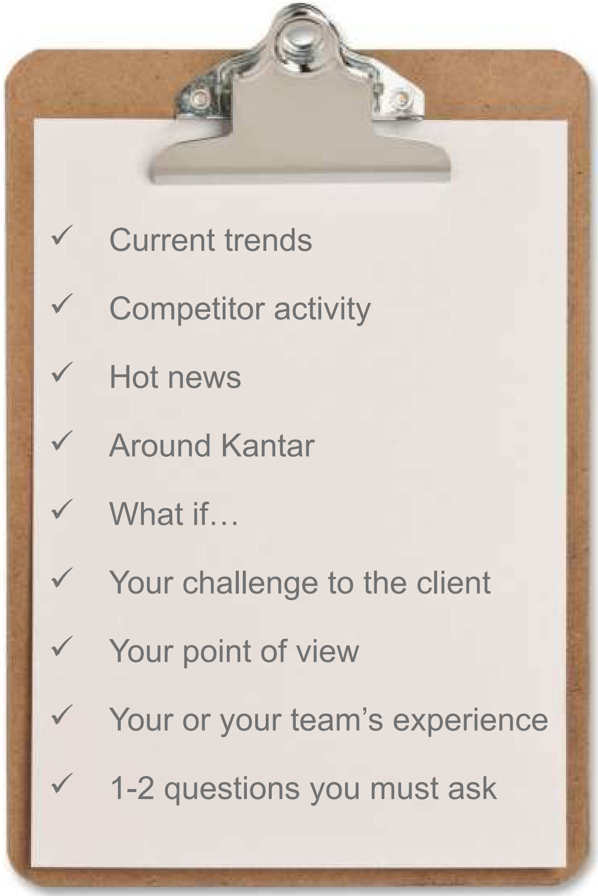
Do your **desk research** to get to a first thought on the client’s issue

BUT…use every interaction with the client as an opportunity to **refine the CQ**

Keep an **open mind** and investigative approach

Any client relationship starts with how well you know the client

Prepare by getting to know them – their challenges, opportunities, business performance, and more



- Preparation

Understanding your client

FOCUS AREAS	WHAT YOU NEED TO KNOW ABOUT YOUR CLIENT
Turnover	What is their $ turnover and profitability with a 3 year history? When does their financial year start and end? How are they doing against budgets/targets?
Client strategies	**What is the overall company strategy?** What are the short term objectives they are trying to achieve? **How are they structured as a business? How is their Research/Insight function structured?** **What do their internal clients want to achieve with their core brands?**
Brand strategies	What does the Client wants to achieve with their core brands? What can KR do to help them achieve their brand objectives? What role do we play and how can we add more value?
Key competitors	Which brands does your client view as competitors? What do their competitors do well and where are the gaps for them that Kantar can help them understand and exploit? What are their weaknesses/needs and how can Kantar help them become more competitive?
Who does what?	**Who are the key contacts, decision makers and influencers?** How does the organization make decisions? Who holds the budget (formal and informal)? When does the budgeting process start and finish?
Our services within the client	What could we achieve with them in 2016 and beyond? What range of current services do we currently supply and why? What services do you think would provide even more benefit for them? What would the ideal timetable look like? Does their CEO know you?

- KEY SKILLS

Key success factors

1. **Active listening** – asking open questions & asserting

2. Distilling the client's **Central Question**

3. Identifying clear **next steps**

- KEY SKILLS

Key success factors

1 **Active listening** – asking open questions & asserting

Listening is a prerequisite to defining trust in order to:

- *Connect to define the problem*
- *Connect to understand how they see the problem*
- *Connect to begin building trust*

What are some key skills you've found to be effective in connecting with clients?

  - Ask more probing questions to develop relationships with clients
  - Discover and verify to ensure listening and hearing
  - Don't jump into solutions – work through to find solutions (explore / listen vs. push / talk)

The structure of a great conversation

Must haves:

- Idea to help them
- Opportunity to do something different and new
- External perspective on challenges (yours!)
- Add value to the relationship

Nice to haves:

- A POV
- A clear follow up

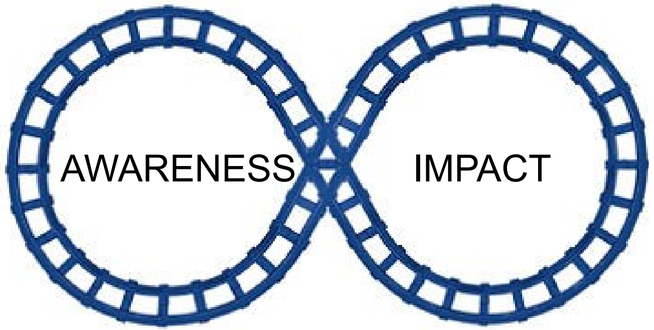
Section	Notes
Credibility	Focus on the hook Validate why you are calling
Rapport	Focus on asking whether this is something they're looking into / establishing if it's a good time *Is this something on your radar?* *Is this a good time to talk?*
The Hook	Reiterate why – the hook (12 words) *Example: "XXX or other clients have seen 10% improvement in …"*
Information Exchange	Ask where their thinking is currently – listen! Show you have experience / a point of view in helping
Actions	Close out the meeting – set a date on the phone Send meeting invite with suggested agenda

Active Listening & Asserting

- Suspend your agenda
- Be fully present
- Discover
- Verify

Listening at 3 levels

1	**INTERNAL LISTENING**	Spotlight is on myself and what is means to me (my thoughts, judgements, feelings, conclusions
2	**FOCUSED LISTENING**	Focus is on the other person’s words, not much awareness of the outside world
3	**HOLISTIC LISTENING**	Focus is on other person’s energy, listening with all your senses and intuition



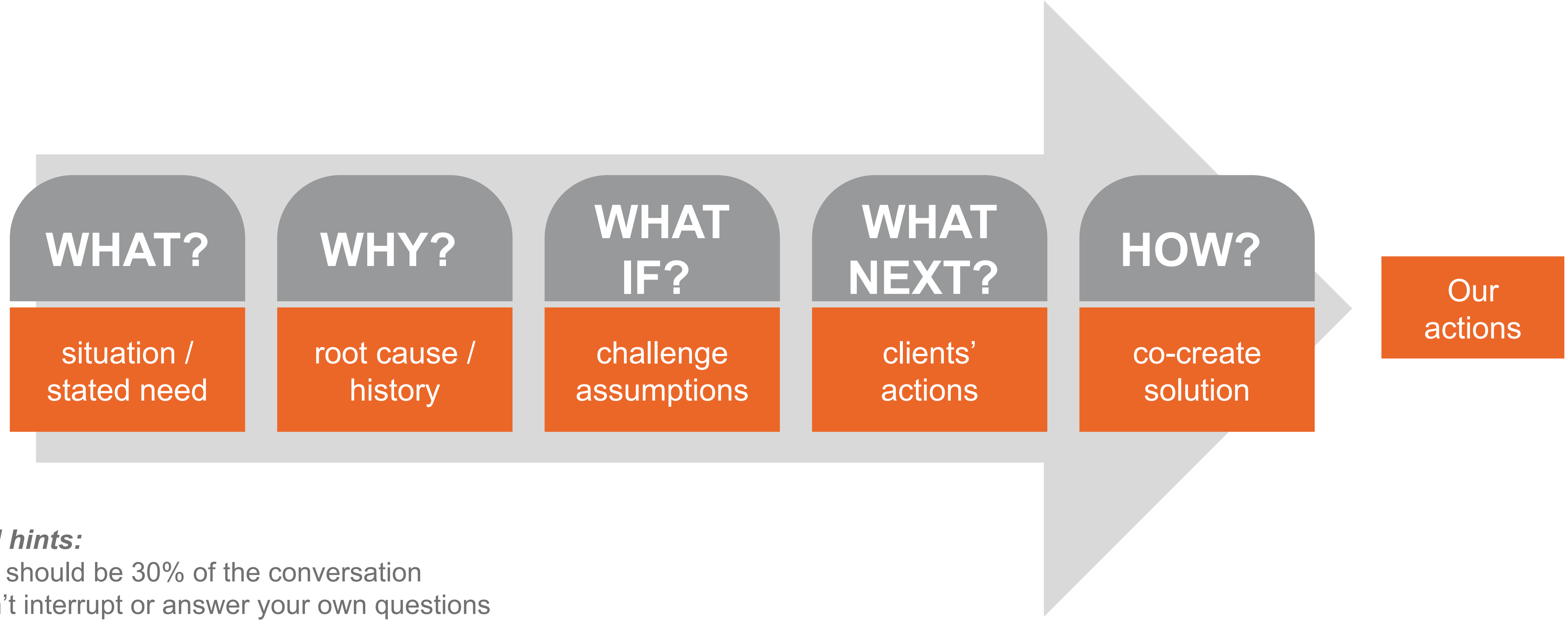
Listen ... don’t just hear

SOME OF THE MOST COMMON CAUSES OF INEFFECTIVE LISTENING

QUESTIONING IS WORTHLESS UNLESS THE ANSWERS ARE LISTENED TO

Active listening requires being curious

Discovery questions



Helpful hints:

- You should be 30% of the conversation
- Don't interrupt or answer your own questions
- Ask one question at a time
- Probe responses
- Use open & closed questions
- LISTEN – 2 ears, 1 mouth

Active Listening & Asserting

- Decide
- Have presence
- Express
- Confirm

The 3Cs are a reminder to be courageous but also impactful in all our conversations

- Add content about 3Cs

Clear

Concise

Compelling

Active Listening & Asserting

- Suspend your agenda
- Be fully present
- Discover
- Verify

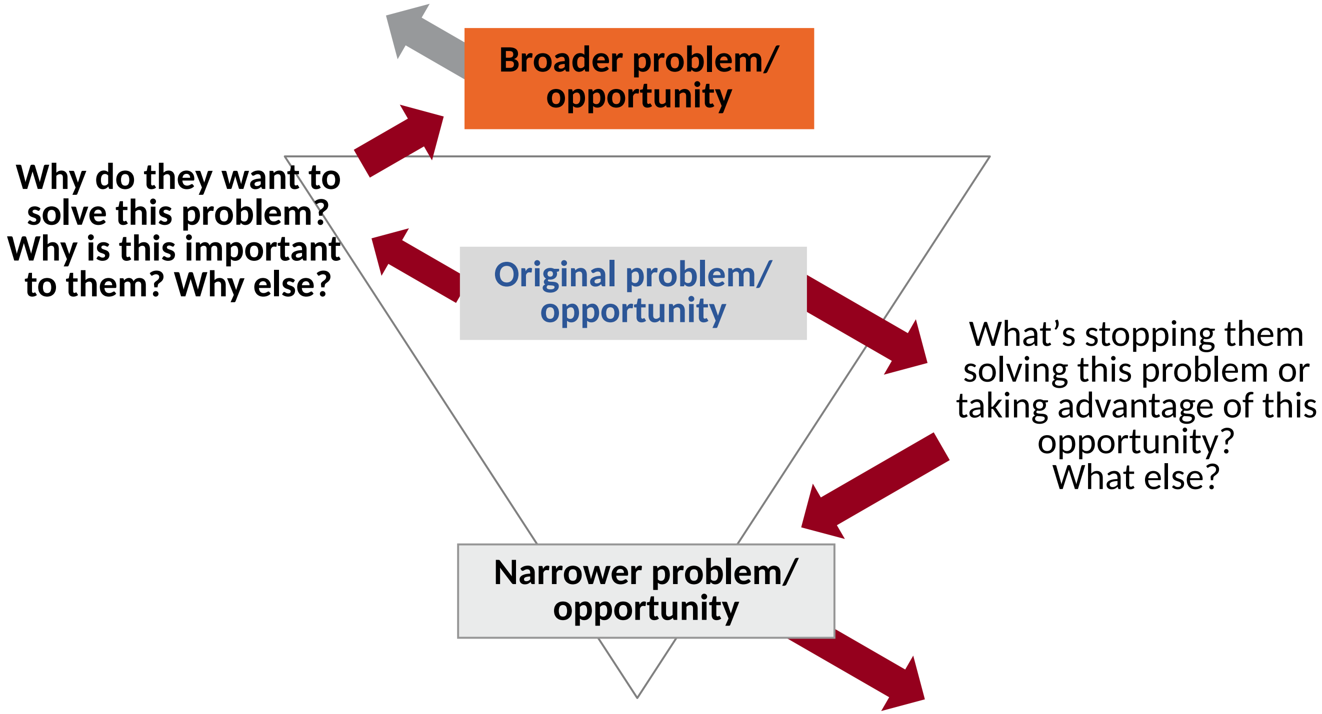
- Decide
- Have presence
- Express
- Confirm

Key success factors

2 Distilling the client's **Central Question**

The situation presented by your client is not always the real problem

Problem / opportunity definition and prioritization is key

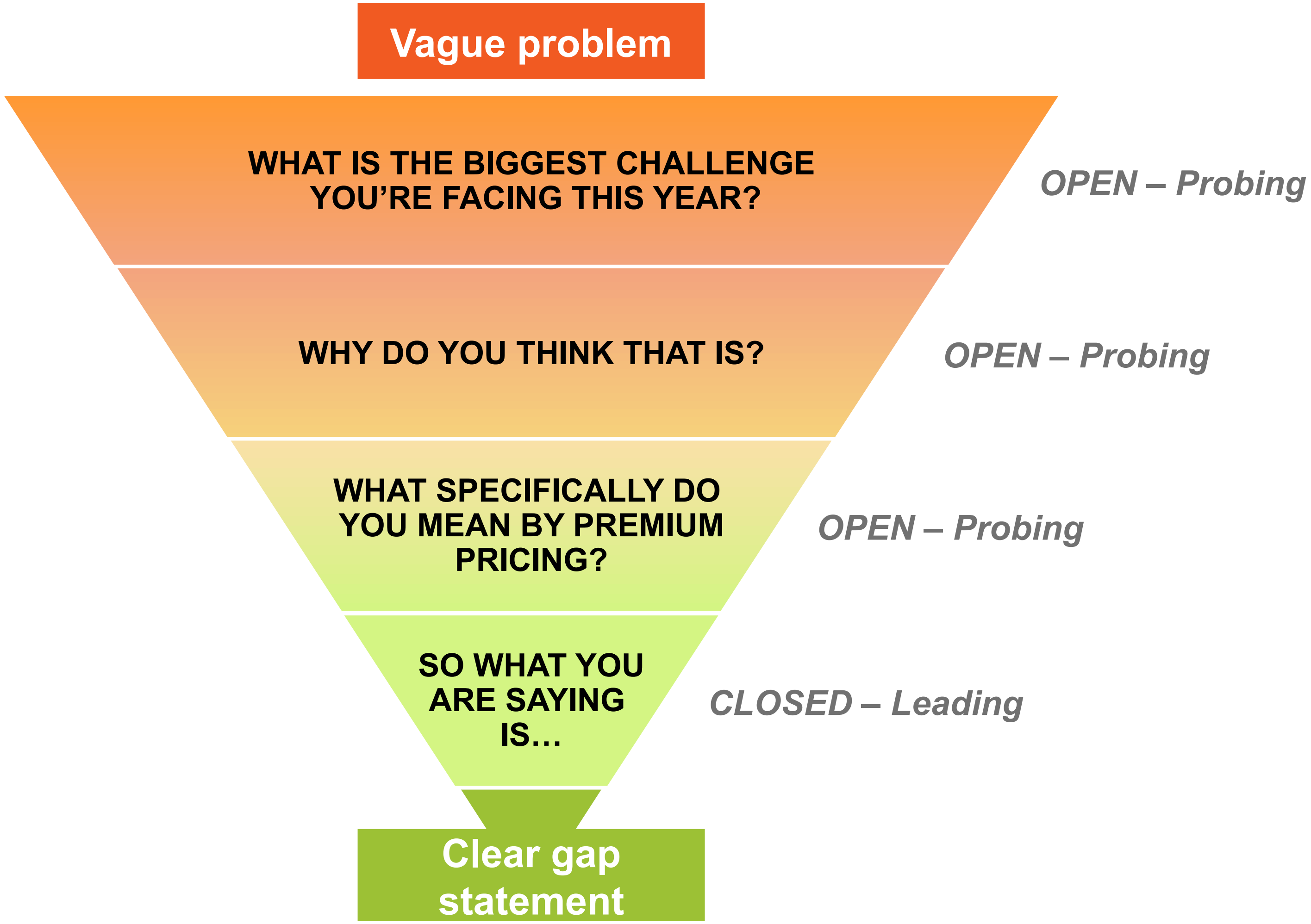


Identify the gap between clients' present state and their desired state

Getting to the Central Question

Open and closed questions help transform a vague problem into a clear gap statement

LISTEN!!



- CQ

Discover the central question

STRATEGIC CONTEXT	SCOPE

STAKEHOLDERS	CENTRAL QUESTION	LEADING INDICTATORS

BARRIERS TO ACTION	SUCCESS MEASURES / OUTCOMES

- CQ

Discover the central question

STRATEGIC CONTEXT

- Macro trends?
- Past – now – future?
- Opportunities & challenges?
- Internally & externally?

START

SCOPE

- What CAN be done?
- What MUST be done?
- What is NOT to be done?

STAKEHOLDERS

- What stakeholders & decision owners are involved?
  - Interests?
  - Influence?
  - Idiosyncrasies?

CENTRAL QUESTION

LEADING INDICATORS

- How will you know?
- Need to focus on alignment, action, achievement

BARRIERS TO ACTION

- Biggest barriers?
- What are we in control of?

- Culture?
- Leaders?
- Ownership?
- Skills/resources?
- Energy?
- Delivery?

SUCCESS MEASURES

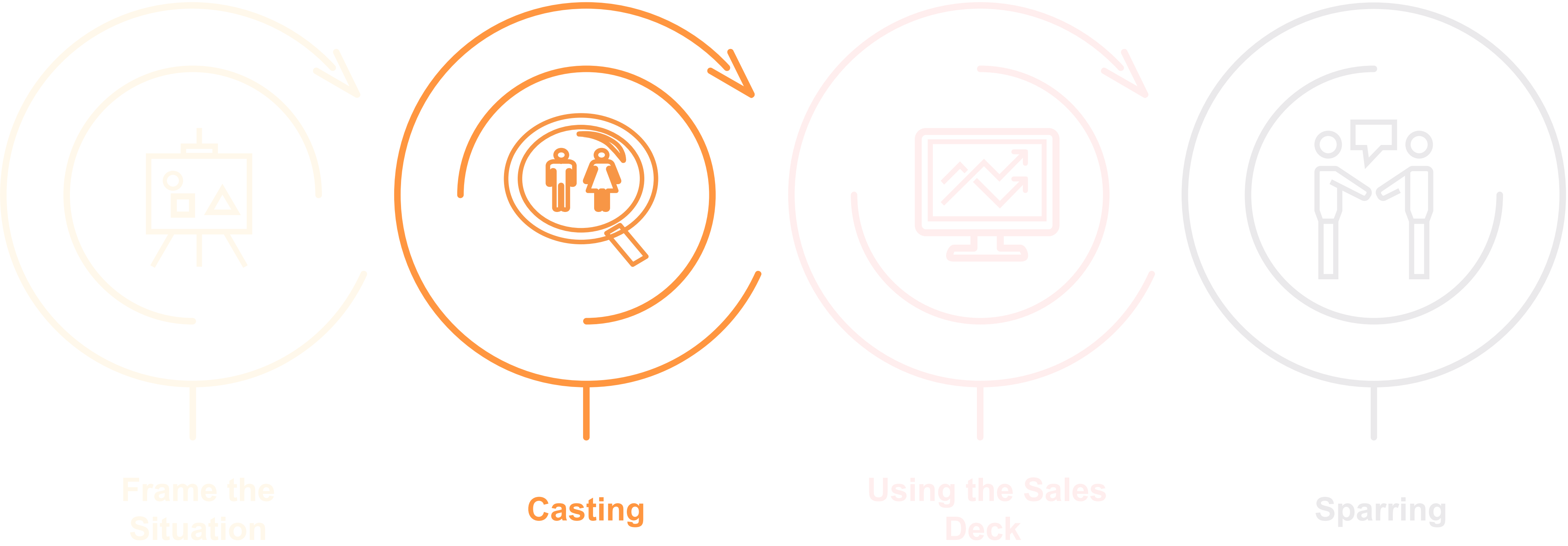
- What are the specific outcomes that must be achieved?

- Specific
- Measurable
- Actionable
- Realistic
- Time bound

Create a powerful perspective in your central question

- **B** old
- **I** ntegrated
- **T** op Management Perspective
- **E** nergizing - Action Oriented
- **S** imple

The First Meeting



The client buys YOU not your deck

Think about who the client will want to work with

Decisions are based on the value we create for individual clients and their business

Think first about the value to the client – what will they get out of the project

ME

BUSINESS GROWTH

VALUE = IMPACT / COST

TIME

MONEY

WHAT IS THE HIERARCHY OF THESE VALUES TO CLIENTS…?

1. ME
2. TIME
3. BUSINESS
4. MONEY

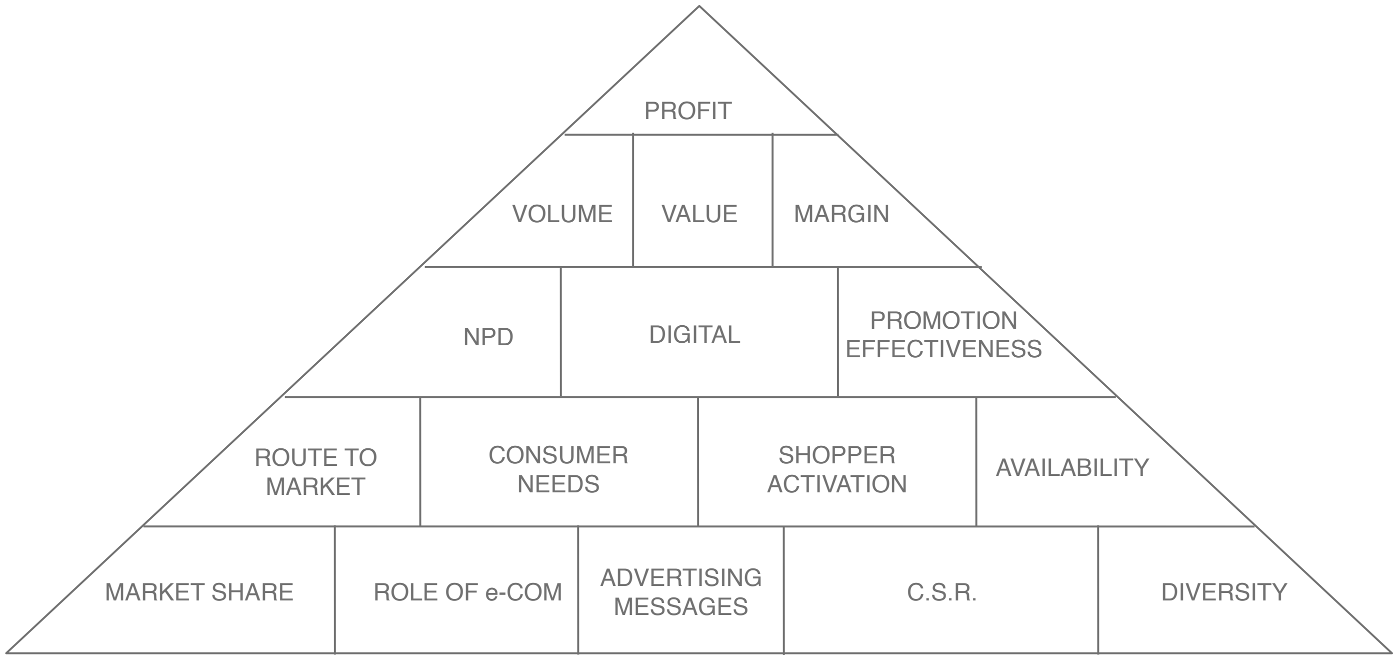
Value Equation: what could be in it for them?

SECURITY	EGO	PERSONAL DEVELOPMENT
– Feel more secure/safe – Be more flexible – Increase self esteem – Increase personal productivity – Contribute to the organisation – Gain recognition	– Get more power – Achieve control over others – Remain in power – Be an instrument of change	– Be seen as a leader – Increase responsibility/authority – Get more freedom – Increase skills – Be seen as a problem solver – Increase mental stimulation – Have more time with the family – Improve social status – Get more leisure time – Pursue a lifestyle

Think about what you need to build

	Suspending our agenda, questioning, listening, playing back		Showing you've listened, understood and you really get it. Beyond empathy you are already helping take this forward	
	Build Credibility	Create Empathy	Show Savvy	Generate Desire
Element	Do you connect with my sector and connect me with the bigger picture? And you get my role?	Can you help me with my personal agenda and the way I like to work?	Are you smart in your questioning and helping me think differently?	Will you take me forward in my thinking or ways of doing things?
We do/ use	Use an irresistible hook Talk their language Drop in a nugget from a relevant case study	**Ice Breaker** exercises questions to gauge personality type/ org culture/ mood state/ mission	Talk their language Zoom, zoom with organizational radar and commercial mindset	Smart Homework beautifully presented Give a sense of **co-creation** in the moment **Personal/ aspirational touch** Show it's **buyable** Clear action plan – what will happen in the next few days
Client response	I want to listen to you	You'll fit me and my ambition	I'm starting to feel excited by this conversation	I want to work with you… I feel like I'm working with you already

Consider the client’s hierarchy of needs



KANTAR

The First Meeting

- Use your initial preparation to create a Sales Angle
- Adapt the Vermeer Sales Deck to emphasise salient points

- Use the book to be familiar with the subject matter.
- Get familiar and comfortable with the content!

The First Meeting

- **The first meeting is key opportunity to start building a Trusted Advisor relationship**
- *Before* the meeting, set up a sparring session

- Around the Vermeer globe we have experience from almost every sector – tap into it!
- If possible, partner up for the meeting with a Vermeer colleague who has experience in the sector

- KEY SKILLS

Key success factors

3 Identifying clear **next steps**

XX

Running S5 meetings to distil the central question

STEP	NOTES IN PREPARATION FOR THIS MEETING
Start with impact	• Introductions & rapport building: quick credibility (20 seconds on who you are and how you can help) – get to know them as humans • Re-confirm: Why (objective), conversation agenda and time frame, if anything has changed • "What would *you* like to achieve in this 60 minutes?"
Situation analysis	• Curiosity: ask questions and probe to really understand them, their business and their issues, and their "me agenda" – clarify as required to distil their "central question" • Have a point of view, have empathy • Listen to <u>them</u> – common barriers are: your next question, distractions, "I know that", assumptions
Summarise	• Repeat back key points – convey that you heard and understood – Keep it short – Use their language words – Ask "what else?"
Solution	• First class thinking – co-create solutions with them (timing, actions) • Ask for feedback (budget, approach)
Steps forward	• Be clear: *what* will happen next, *who* is responsible, *when* each step will happen • Follow up in 24 hours with this plan

The follow up call

A meeting follow-up call is a great way to

- Reconnect personally
- Build some Vermeer 'reasons to believe'
- Demonstrate that you listened, understood and empathised

The ‘call for questions’

Types of clarifying questions

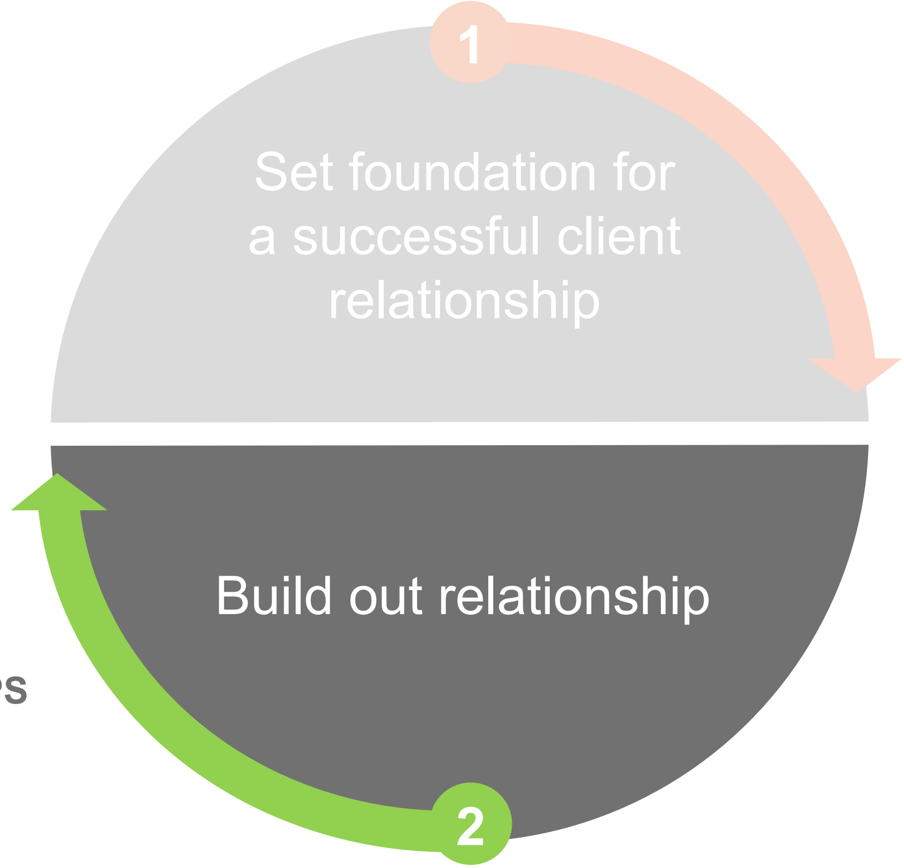
- **Technical questions** – information you need to answer the brief
  e.g. what markets do we need to cover?

- **Demonstrate savvy** – really insightful questions that show the depth of our thinking
  e.g. how will this connect in with your innovation team?

- Open questions to **create empathy and generate insight**
  e.g. what might get in the way of this succeeding?

- **Framing a point of view** – starting to shape or reframe the brief, maybe to establish a point of difference Vs competitors
  e.g. what do you think the local market team perspective is on this?

The objective of pathfinding is to foster a proactive approach to client development



✓ BUILD TRUST

✓ DEFINE ROLES

✓ CRAFT AN EXPERIENCE

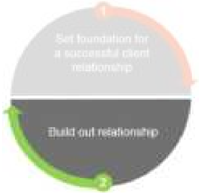
✓ BE A TRUSTED ADVISOR

✓ STRENGTHEN RELATIONSHIPS

✓ DELIVER THE EXPERIENCE

When is the best time to "sell"?

POP QUIZ!



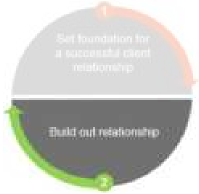
BRIEFING AND KICK OFF

CRITICAL MID-PROJECT MEETING

DE-BRIEF AND DELIVERABLE

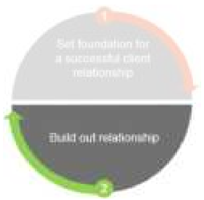
"Sell" = advocate for next steps

There are many ways to grow our business



		EXISTING WORK	NEW WORK
New opportunities, created through client work, thought leadership or networking	NEW CONTACT	SCALE	WARM LEAP
Our day to day client relationships	EXISTING CONTACT	REPEAT	X-SELL

Repeat is all about the future value we can create for clients and their business



Credibility

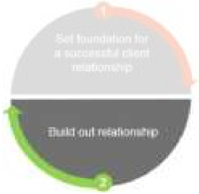
Empathy

Understanding

Desire

	EXISTING WORK	NEW WORK
NEW CONTACT		
EXISTING CONTACT	**REPEAT** *Understand client needs*	

Paths to growth



Credibility

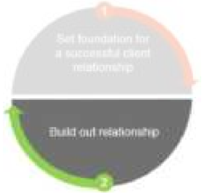
Empathy

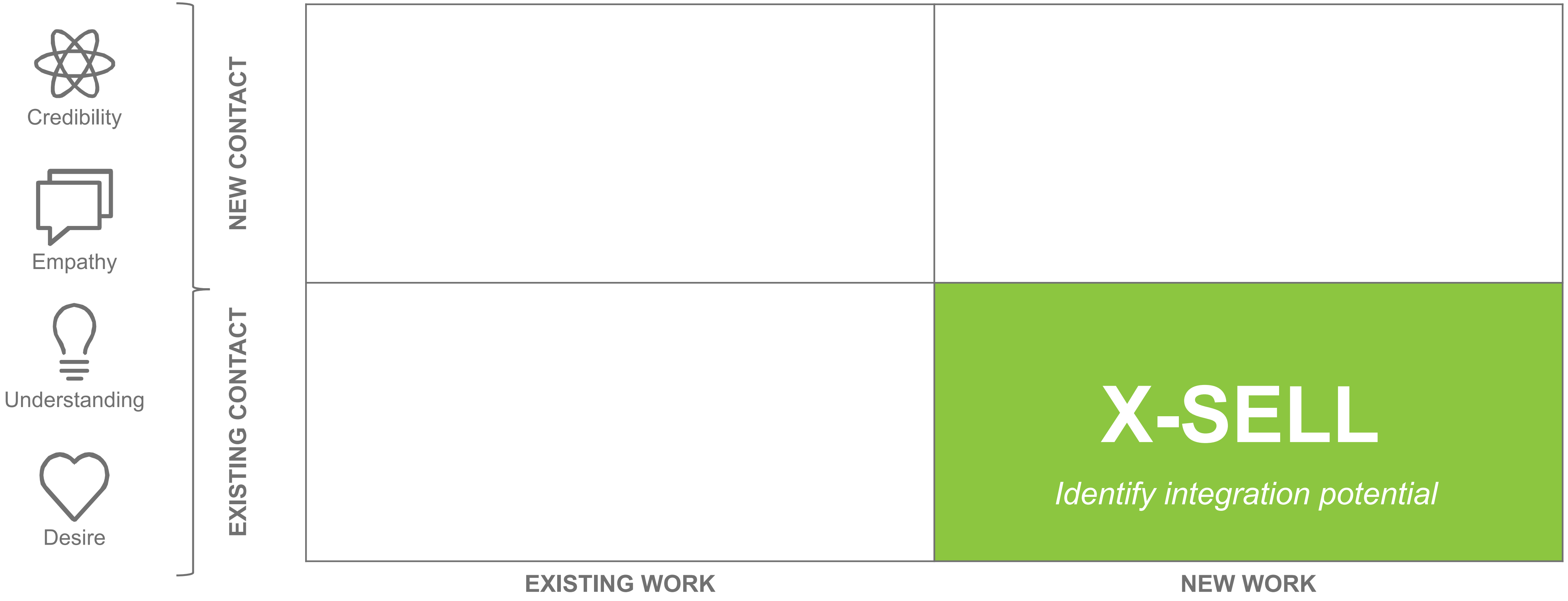
Understanding

Desire

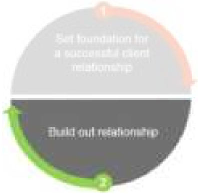
	EXISTING WORK	NEW WORK
NEW CONTACT	**SCALE** *Map the client ecosystem*	
EXISTING CONTACT		

Paths to growth

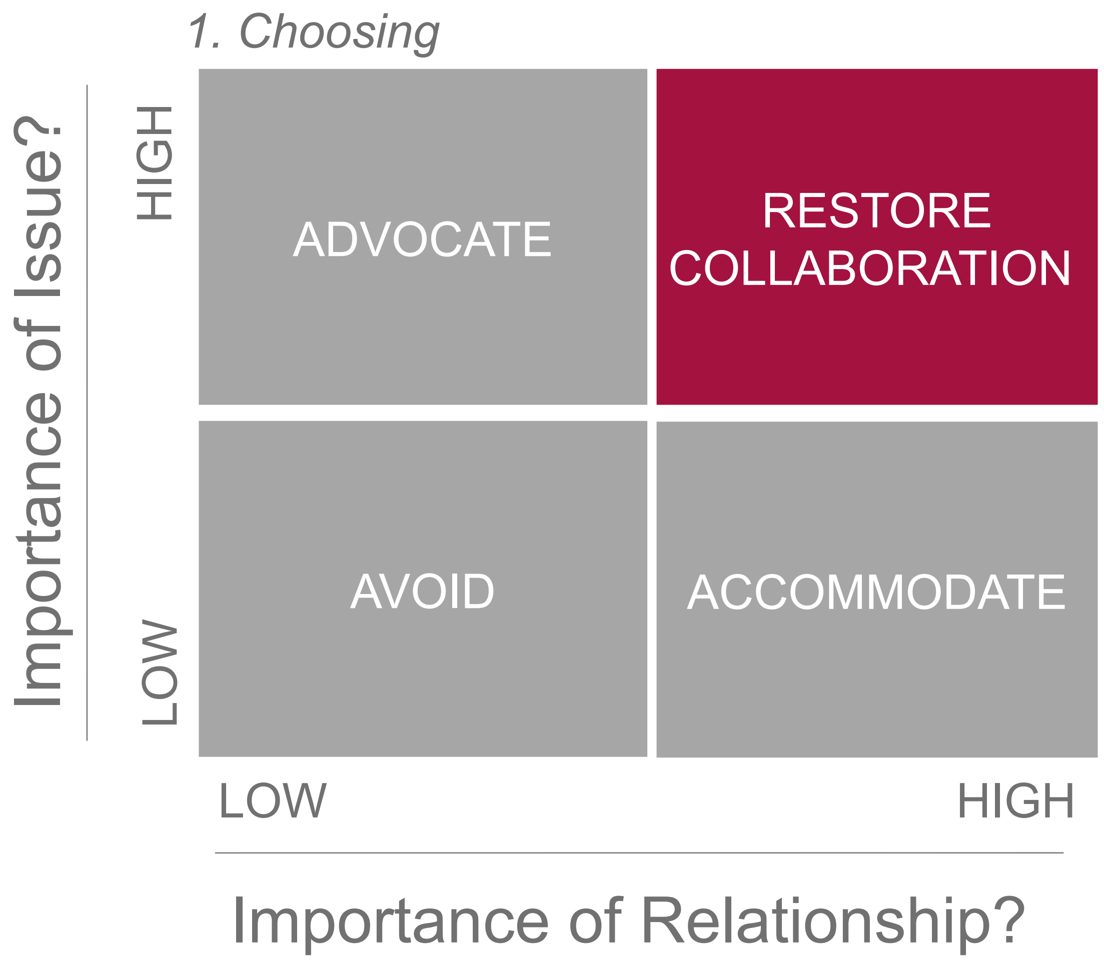




Paths to growth

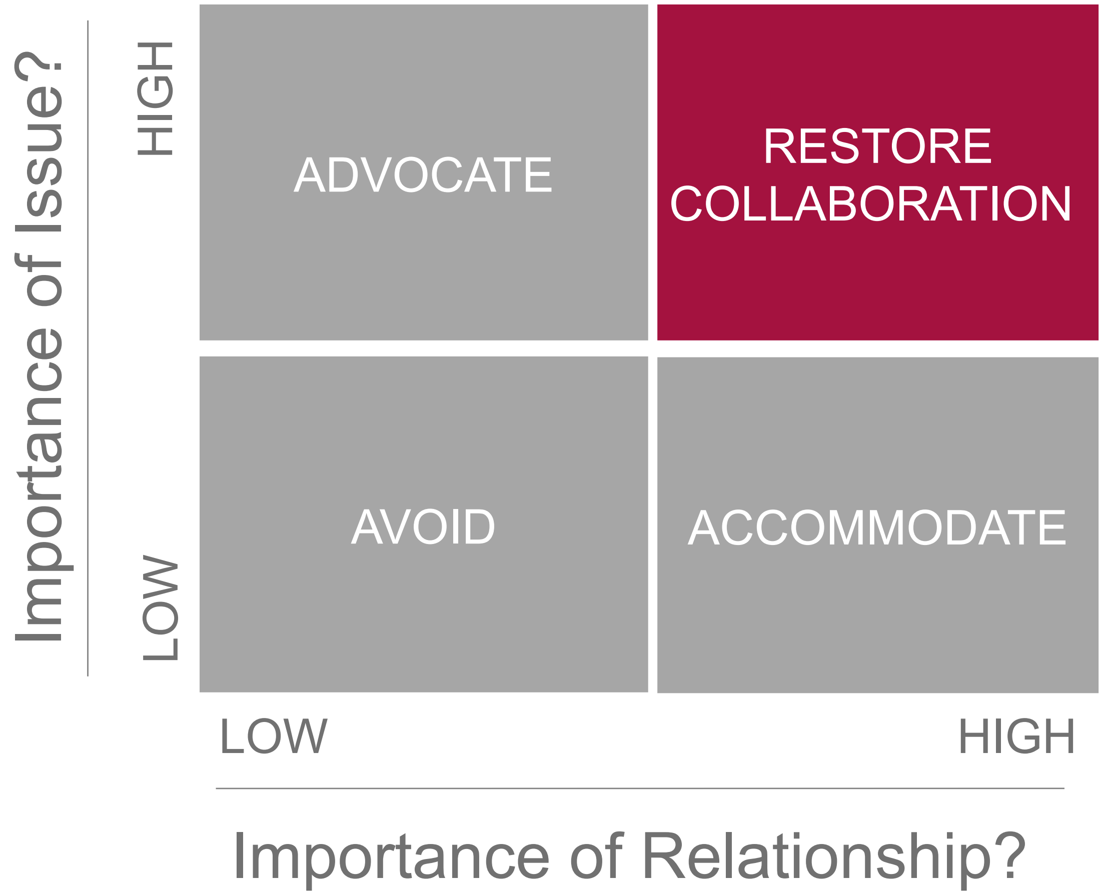


Handling conflicts starts with diagnosing the importance of the issue and the relationship



We must then be self-aware to act in the best interest of the desired outcome

1. Choosing



2. Being self-aware

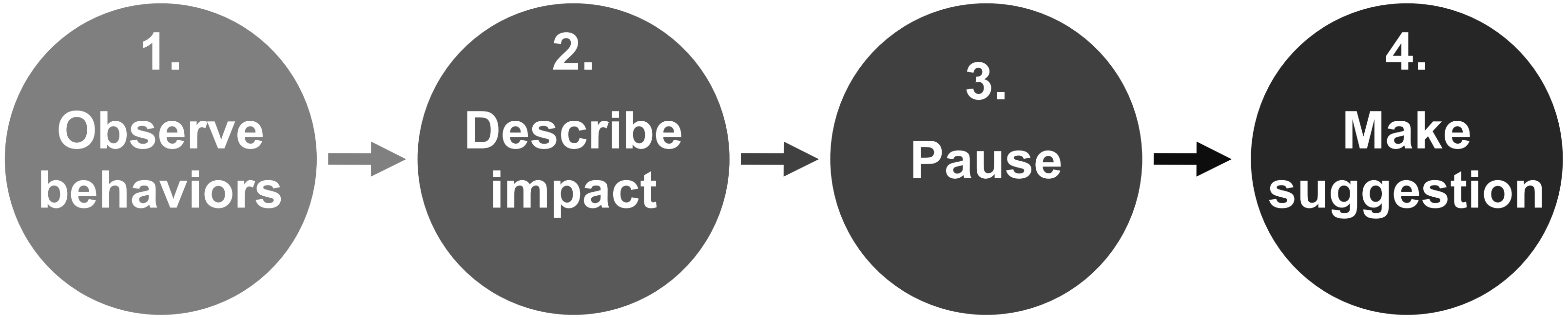
- Threat or injury
- Triggers
- Story to tell
- Story the other tells
- Alternatives
- Find empathy

3. Taking action

- Name it
- Listen (without refutation)
- Tell (without blame)
- Relationship-solve
- Problem-solve
- Perseverance

Role playing is an essential element of strong performance – both for early client meetings, and as relationships progress

- Add content about practicing, role playing, and explaining the feedback model more



CONCLUSION

Summary & Key Takeaways

Kantar Keys to Client Success

“best behaviors” / “essential actions”

- In summary, there are certain behaviors we must all keep in mind

1. **3Cs** – be more clear, concise and compelling
2. **2 ears / 1 mouth** – listen 2x as much as you speak
3. **Open-ended Qs** – be more interested than interesting
4. **Suspend your agenda** – lower your self-orientation: it’s about the client, not you
5. **CRI-ing is key** – credibility + reliability + intimacy = trust
6. **Cue the CQ** – find the client’s underlying ambition / objective

APPENDIX

Four characteristics of empathetic listeners

- Desire to be **OTHER-DIRECTED**, rather than to project one's own feelings and ideas onto the other
- Desire to be **NON-DEFENSIVE**, rather than to protect the self. When the self is being protected, it is difficult to focus on another person
- Desire to **IMAGINE** the roles, perspectives, or experiences of the other, rather than assuming they are the same as one's own
- Desire to **LISTEN AS A RECEIVER**, not as a critic, and desire to **UNDERSTAND** the other person rather than to achieve either agreement from or change in that person


LISTENING

EXERCISE 1

Be Fully Present

Find a different partner and decide who is ‘A’ and who is ‘B’

A: For 2 minutes, try to convince B of your perspective on a topic about which you are passionate.

B: Listen to A. Do not speak, but listen to your partner. When I raise my hand, lose focus while my hand is up. When I put my hand down, refocus your attention on A

10 MINUTES

PAIRS

EXERCISE 2

Suspending Your Agenda

Find a different partner and decide who is ‘A’ and who is ‘B’

A: Think of a topic that you’re passionate about and make your case to B, trying to convince him/her of your point of view for 2 minutes.

B: Listen to A as s/he tries to convince you, but, in your mind, take the opposite point of view. But do not respond at all while s/he is talking.

10 MINUTES

PAIRS

DISCOVERY

Group Exercise 1

Discovery

1 Volunteer come to the front and respond to questions from the group.

Rules of the group's questions:

- The questions are in service to our volunteer to help him/her gain more insight and understanding.
- First round: "What?" questions only
- Second round: "Why & What?" questions only
- Third round: "What if, Why & What?" questions only
- Every question must build on the answer that was just provided.

10
MINUTES

PLENARY

Group Exercise 2

Discovery

1 Volunteer come to the front and respond to questions from the group.

Rules of the group's questions:

- The questions are in service to our volunteer to help him/her gain more insight and understanding
- We stick to What/Why/What if questions but they can be mixed more fluidly
- Every question must build on the answer that was just provided.

10
MINUTES

PLENARY


VALUE & IMPACT

Individual Exercise

Your Key Client's CQ

- Identify one key client – a person – for and with whom it would be highly valuable and relevant to explore his/her CQ
- Review the CQ elements. You can use the CQ worksheet if helpful
- Develop a draft CQ for your client – what s/he should be asking him/herself, not necessarily what s/he is asking currently
- Develop 2-3 questions that you'd like to ask your client to expand your shared understanding and thinking about the CQ

10:00
MINUTES

INDIVIDUAL
EXERCISE

Paired Exercise

Deepen Your CQ Thinking

Find a partner

Two 10-minute CQ deep dives:

Dive into A's CQ: Discuss and explore A's draft CQ and framework content
Explore A's 2-3 client questions

- A: Give B your 2-3 client questions
- B: Ask A his/her 2-3 client questions; one at a time, allowing A to reflect and respond
- A: Answer as if you were your client; see what you discover!

Switch and repeat (2 total rounds)

Learning objective: Systematically get inside your client's world and expand your strategic thinking about his/her Central Question.

10:00
MINUTES

PAIRS

Key Learnings and Actions

Start Doing	Stop Doing

Do More	Do Differently