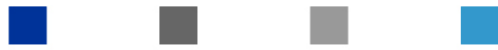


APIC



Business Consultants Limited

RELATIONSHIP PLANNING

Step 1 - The Relationship Audit

Gather data on the relationship you have with the customer in question.

Step 2 – Data Organisation

Add appropriate data into your SWOT analysis as follows:

Step 3a Development Track SWOT Analysis – Matching Data

Review Strengths and Opportunity information. Pair up opportunities in the customer and his market with related strengths of your company. Be hard on your self and be specific. You may match one strength to more than one opportunity and vice versa.

Step 3b Improvement Track SWOT Analysis – Matching Data

You may be left with a number of attractive opportunities but have recorded real weaknesses or there are threats recorded that could kill the opportunity. This process will also highlight new weaknesses and threats that you should add to your SWOT. Pair up opportunities in the customer and his market with related weaknesses of your company. Pair opportunities with threats. Be hard on your self and be specific. You may match one weakness to more than one opportunity and vice versa. Remember weaknesses that do not match up to an opportunity can be ignored.

Step 4 – Both Tracks - SWOT Analysis – Prioritising Opportunities

Whether you are going down both tracks simultaneously (recommended) or one at a time you will have choices to make about which opportunities you should work on. At this stage you should prioritise in **both** tracks according to:

- Their potential for you and the customer
- Whether they need to be tackled early because other actions and opportunities are dependent on them

Don't be tempted to focus only on the development track just because quick wins can be made.

Consider the "Track" lists and rank the opportunities you have identified.

Step 5a – Development Track SWOT Analysis - Opportunity Planning

Using the "Track" list, describe each opportunity in detail, its potential and the overall strategy for activating it e.g.

The match

*Gainstead Industries are manufacturers and importers of solar energy and heating equipment. They are about to acquire Baxter Industries who are a company in a similar and **complimentary** market to Gainstead.*

Baxter deal directly with an importing company who have not capitalised at all on cross sales opportunities with this client. You are the main agent and installer for Gainstead and you could gain a considerable amount of business should the takeover go your way. You have the in-house marketing experience to segment and sell to new markets (and to cross sell) to the new part of Gainstead.

The strategy

Don't wait until take over is complete! Convince the MD of Gainstead of the possibilities for mutual development and get his agreement to meet Baxters, to review their book of business. Demonstrate products/services and gain agreement in principle to "pitch" for the business. Analyse Gainstead's business and identify best potential. Present relevant cross sales case study success and obtain the go ahead when take over takes place.

Using your Development Track sheet, do this for each Opportunity-Strength match.

Step 5b – Improvement Track SWOT Analysis – Opportunity Planning

Using the Improvement Track, describe each opportunity in detail, its potential and the overall strategy for converting the weakness or threat e.g.

The match

This company is not capitalising on the excellent cross sales opportunities in its customer base or on the significant walk-in enquiries it attracts. There is significant opportunity for you to get closer to this business by helping them improve sales performance and our results. We lack resource and time and knowledge about how to segment and milk the customer base.

The strategy

Get ourselves in a position to make a credible proposal to help and be in a position to deliver. Consult marketing re cross sales communications.

Using your Improvement Track, do this for each Opportunity-Weakness and Opportunity-Threat match.

Step 6a - Development Track - Development Objectives

For each opportunity write one or more objectives related to what you wish to achieve. Make them SMART.

- Specific
- Measurable
- Agreed (or achievable)
- Realistic
- Time Bound

Think short, medium and long term.

Step 6b - Improvement Track - Improvement Objectives

For each opportunity write one or more objectives related to what you wish to achieve. Make them SMART.

- Specific
- Measurable
- Agreed (or achievable)
- Realistic
- Time Bound

These are likely to be more medium and long term.

Step 7a - Development Track - Action Plans

You now need to plan how each objective is going to be achieved. **Objectives without plans are just good intentions!**

The planning process requires you to:

1. Refine/Restate the SMART Objective
2. Refine/Restate the Strategy
3. List specific action steps, who takes them and by when.

For more important or involved plans, a more sophisticated process may be needed. The Preventative Planning Process should be used in these situations.

Step 7b – Improvement Track - Action Plans

You now need to plan how each objective is going to be achieved. **Objectives without plans are just good intentions!**

The planning process requires you to:

4. Restate the SMART Objective
5. Restate the Strategy
6. List specific action steps, who takes them and by when.

For more important or involved plans, a more sophisticated process may be needed. The Preventative Planning Process should be used in these situations.

