<u>Best Practices in Protecting Your Existing Customer Base</u>

Topics

- Cloud Strategy
- Defending outsource vs. in source
- Measuring Customer Satisfaction/Loyalty
- How to Differentiate?
- How to beat CDW, etc. competitors
- New accounts use installed base
- Marketing resources
- How to catch a customer before the leave
- Ensuring loyalty to you not to sales people
- Customer loyalty/retention
- How to detect & respond to threat
- How to get 100% of the business
- Building meaningful relationship
- Define what existing customer needs
- How do you build a program to effectively maintain contact in a way that is valued by your customers?
- How do you move from a supplier to a trusted advisor?
- If a relationship is under threat, what is the most effective response?

Better practices:

- Partnership agreements
- Budget discussions
- ROI Analysis
- Program management Lead
- More direct to customers
- Value add/support
- Don’t we use word customer- use partner
- QBRs critical (programmatic)
- Lunch and learn
- Regional events
- Advisory board
- Staff on-premise
- Social media
- Case studies/newsletters
- Marketing/MDF
- Economy/terms

Solutions/ways to build new and keep old

- User groups
- Local “conference”
- CIO Roundtables
- Catalyst
- Facilitator
- Subject matter expert
- Influencer

- Ball games
- Live meeting
- Client appreciation party
- Thank you after projects
- Newsletters
- Case studies – to vendors too
- Charity events
- Win-wire – sent to
- Staff charitable work required
- Foundations
- QBR's
- Surveys

To be a trusted advisor:

- Marshalling resources to meet client needs
- Know when to say "No"
- Aligning technology to meet business needs/goals
- Keep clients' best interests in mind
- Integrity

To manage customer relationship threat:

- Manage vendors
- True costs of internal staffing
- Overflow/staff augmentation
- Promote value consistency