

The Project Check-in Strategy

Get more work from the clients you have using the Project Check-in Strategy

You know the 80/20 rule. 80% of the work comes from 20% of the clients. That's why it's important to turn those precious clients into long-term relationships and have them think of you as a strategic partner. It will be much easier and more gratifying to be a strategic partner than a vendor or supplier, and it will be great for your cash flow too!

The Project Check-in Strategy is a way to show that you care about results and you want your client to be successful. It's a follow-up to see what happened and what the outcomes were. It could be for a rebrand, a campaign, a website, etc.

Just follow these steps:

A Check-in can be done anywhere from 3 - 12 months after a project has been completed. Use this as a strategy to reconnect with your client, learn about their current challenges and see what further assistance they need to reach their goals. The following script will get the ball rolling. It can be a conversation or an email. Feel free to adjust it based on the project specifics and timing.

Hi John,

We do a [Brand] Check-in [12 months] after launching a new brand. It's a 45-minute meeting where we'll discuss your results since you launched the brand and brainstorm ways to build on what we've started. There is no cost to you, and no preparation is necessary. Our objective is to make sure you're getting the maximum benefit from the work we did together.

When would be a good time?

The meeting:

Ask these 5 questions:

1. How has the [*campaign/brand/website*] performed over the last (x) months on a scale of 1-10?
2. What do you think would make it a 10?
3. What is your goal for the 6 months?
4. What are the three biggest challenges to reaching this goal?
5. How will you overcome these challenges? (This is where you start to brainstorm ideas)

Here's the opportunity to uncover new ways to help.

Here are some examples of problems you may uncover when you ask these kinds of questions:

Problem: The rollout has been inconsistent because we didn't include all the touchpoints or detailed guidelines in the initial project.

Solution: A touchpoint audit and brand guidelines that include all key touchpoints.

Problem: We had a major changeover in the team since the launch

Solution: A full-day team session to take them through the development of the brand and its key attributes to get them all on board.

Problem: The sales force is not communicating a consistent message

Solution: Interview sales force members individually to find out what's happening. Do a series of branding days with the sales force.

Problem: We're getting a lot of traffic to the site, but the bounce rate is high.

Solution: Why don't we create some lead magnets to build the email list, and let's look at the messaging and audience. Maybe we need to drill down further on the audience.

Problem: We've gained 3,000 followers, but they are not taking action.

Solution: Let's look at the call to action and see how we can get more activity.

Problem: The ad looks good, but we didn't get any calls.

Solution: I know you wanted a print strategy for this publication, but we should consider adding a digital strategy and put some metrics in place that we can measure.

If you come up with some winning ideas, they will likely re-engage with you. Start asking your clients about goals and results, and you'll their trust and quickly gain strategic partner status!

Who can you connect with for a Project Check-in?