Post-Meeting Next Steps

It is important at the end of the meeting to be clear on next steps and to ensure the client is committed to those next steps. Sometimes a final decision cannot be made until the client has considered or consulted further, won the buy-in of other decision makers or dealt with other priorities first. The key risk is that the client loses momentum after a successful meeting because, for instance, they are distracted by other priorities or fail to win the buy-in from other decision makers.

It is important to end the meeting with a robust discussion regarding those next steps to avoid that risk and provide you with permission to drive the agenda should the decision-making process or implementation of the solution become stalled or derailed.

It also pays to assume that whatever excitement the client feels about your solution in the meeting will wane the longer it takes for the client to finally agree to implement the solution.

Also, be aware of the need to overcome the innate inertia that keeps people locked into the tried and true. Researchers call this the “status quo” bias. Change requires effort, so people tend to maintain the status quo provided it works “well enough” to satisfy their interests. So if your solution represents change, you need to ensure that others involved in the decision-making process move into the buy zone along with your contact.

Consider these points to achieve real commitment on next steps:

- Map out the client’s decision-making process. Focus on any decision makers not included in the current discussion and their possible interests and concerns. Try to arrange to meet the decision makers face to face. If a meeting is not possible, provide your contact with written support that outlines the proposition and its benefits (including supporting evidence and answers to possible objections) and is structured to focus on the absent decision maker’s interests and concerns. Ideally, you should aim to educate your contact on how to talk about the solution in a compelling way.
- Map out a plan and timeline to a decision date including key people, milestones, tasks, resources and barriers to overcome. Work out how you can help the client and what the client needs to do to reach a decision. Hold each other accountable for progress.
- Ask for commitment to next steps. Gaining the individual client’s commitment to acting on the plan requires performance-based rather than promise-based commitments. Research tells us that real commitment requires the other party to:
    - take a concrete action that,

- requires effort,
- is freely chosen, and
- is observed by or known to people other than you.

Concrete action can be as simple as sending an email to a group list and endorsing your solution.

The main point to remember when it comes to mapping out a plan that gets to a decision, is to make sure the client is involved. You can either collaborate with the client to create the plan, or make sure that the client has the chance to provide feedback into any plan that you develop on your own. If the client is involved at some level – either directly in the planning or by reviewing and editing the plan – then there is a level of commitment to that plan.

Also recall the Client Styles tactic sheet. Generally, a bottom line or detail style means that things will probably get done, although the detail style may take longer as they work through the process. Matters may stall with a big picture style because they may avoid any potentially challenging but necessary conversations with other decision makers. However, just because someone exhibits a certain style in a meeting, this does not necessarily reflect their performance or working style, but note the style as a possible red flag to address.

It's important to have a candid conversation with the client about the possibilities of losing momentum. Ask the client to identify what might hinder progress given the nature of their working style, workload and the nature of their organisation. For instance, your contact may be very keen but also very busy – would it pay to ask their second in command to assume some of the workload?

Once you have discussed the possibility of losing momentum, ask the client for permission for you to stay in touch and drive the agenda if things do stall. Tell them that you are conscious of not wanting to bug anybody but you are equally conscious of the cost to the client of not implementing the solution.

Try to start work during any decision-making process. Is there any quick and easy preliminary work that you can do on a no-obligation basis? For instance, are you able to carry out a quick audit of their current systems without interfering with work streams or requiring effort on their part? Don't make it a big project otherwise the client may be put off because it is all too hard or may feel they are being pushed. Any outcome of that work can be offered up gratis so the client has nothing to lose. This approach keeps you in touch, demonstrates value and creates an impression that the job is under way.

Finally, if you have done all you can to drive the agenda then at least stay in touch as situations do change and you should stay on their radar. Think about these points when staying in touch:

- Stay in touch with something of value. Staying in touch should not involve bugging the target for business or calling and asking a lame question like: "I'm just staying in touch, how's things going?" Clients are busy and may resent the interruption to their day. However, a quick note with some insight or information, or a coffee to pass on some advice on a regular but not intrusive basis (without any request for a return favour) can be a powerful way to stay in touch.
- Don't rely on generic "mail-outs". It's fair to say if information is not tailored for the needs and motivators of a specific client, it is unlikely to be read. At least say in a covering note or call why a particular article or monthly team "newsflash" type mail-out is relevant to them.
- Call. If something comes to mind which is useful for the client, consider calling them. Discussions develop relationships faster than one-way correspondence.

The key take-away's for you from this lesson should be:

1. Make sure there are clear next steps, and that they are agreed with the client.
2. To ensure client commitment to the next steps, map out a plan and include the client in its creation – either by jointly developing the plan, or by getting the client's feedback on your plan.
3. Try to find ways to build trust along the way. Maybe do a small piece of work for free that would be a part of your solution. Or agree to touch base at certain times – and make sure you do.