How to Connect with Clients in the Time of COVID-19: 3 Tips via @upbuildteam



The novelty has worn off by now.

Sure, maybe you're still enjoying your new work arrangement more than your old one.

I have at least one acquaintance who said he doesn't think he can ever bear to see the inside of an office again.

Or maybe not.

Maybe it's been a tough transition for you, possibly because you're finding yourself struggling with the same kinds of productivity challenges that beset our nation's late-night talk show hosts.

But however you may be feeling, if you're one of the millions of Americans who have suddenly begun working full-time from home amid the COVID-19 pandemic, it probably doesn't feel like a new situation anymore.

Your adaptable brain has seen to it that you get yourself adjusted.

As part of that process, you are almost certainly at least entertaining — at a low-lying, survival-oriented level — the idea of this being the way you work from now on.

If you're an agency employee or private contractor, your livelihood depends on maintaining healthy relationships with multiple clients.

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That means in mid-March, you had to bring those relationships home with you along with everything else.

So it probably didn't take a post like this to make you ask yourself, "how am I going to make this work?"

How indeed?

Depending on what your previous normal was, this en masse work-from-home moment could be creating any number of new challenges for you.

If you manage accounts and are used to handling your client calls from inside a conference room, breathing the air of group support that comes from being physically surrounded by your team, how are you going to summon that same confidence from inside your (perhaps hastily thrown-together) home office, all alone?

If you work sales and you prefer the old-fashioned, up-close-and-personal approach — business lunches or similar IRL situations — how are you going to establish rapport with a new lead in a world where Zoom is all you've got?

How do you trade face time for FaceTime?

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And if being newly isolated as you work isn’t what’s giving you the cold jitters, what about the forced intimacy of giving your clients a window into your private space?

You can’t separate your personal life from your professional life after you relocate the latter to the residence of the former.

In your office, the only thing you had to do to maintain that barrier was to keep your phone on Do Not Disturb.

Now, suddenly, you’re in a position where any work meeting of any importance could theoretically be jolted by your home life’s wildcard factors, like how:

- Sometimes your kids pick ludicrous fights with each other.
- The ceiling above you creaks frightfully when someone walks across the upper floor.
- The dog sometimes just starts barking for no apparent reason.

So it’s not just that you’re newly alone.

You’re also newly vulnerable!

I’m not qualified to give advice on much in this kooky world, especially now that it’s taken such a dramatic turn for the kookier.

But **from home** is how I’ve been working for all of my nearly-five-year stint at UpBuild, and I’ve led more than one engagement lasting four-plus of those years.

I’ve been establishing, nurturing, and upholding client rapport in completely remote conditions, and from inside my

house, for nearly half as long as I've been doing it at all.

And from this extremely privileged perspective, it has been poignantly fascinating to watch a massive chunk of the workforce scrambling to get its work-from-home bearings all at once.

It makes me want to help, to let everyone know that this new situation doesn't have to be scary.

I've learned a number of things over the course of these years about how to serve and communicate with clients from inside the constraints of remote work, some of which, I've found, can look a lot like advantages if you try only to see them in a different light.

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So let's waste no time and get right into it.

Here are a few tips to help you plant your feet that much faster, which really amount to reminders of what matters most in professional connections.

Everyone needs a little reassurance about now.

Tip 1: Lead With Your Humanity

Since it happens to be almost impossible to stop thinking about for more than a few minutes at a time, let's talk a little more about this uniquely and unprecedentedly strange moment we're having, and use it as an onramp to this first tip.

This is a weird situation, and it is OK to feel weird about it.

Don't believe that you have to pretend it isn't, or avoid the

subject, and don’t let yourself feel like **you’re** weird **because** you’re feeling weird about it.

I’m going to say it again because you can’t get enough reminders: **this is a weird situation**.

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Everyone is struggling in some way, most likely more than one way.

I, despite being confident enough in my work-from-home skills to feel equipped to write this post, still wake up in a cold sweat on the regular thinking about the loss of life, our catastrophically uncoordinated political response, and the long-term economic implications of this rollercoaster that we’re all taking a ride on with no safety harness.

This is the most disruptive and frightening series of global events since World War II, and nobody’s psyche is emerging unscathed.

That includes your clients.

Let’s meditate on that aspect of this for a second.

The near-certainty that your clients also had their lives upended by coronavirus and are also working in a disturbed state, with blurry personal/professional boundaries, for the time being, might seem at first like it will only make your interactions even more awkward.

But it takes only a gentle, empathy-driven pivot to see it instead as something that the two of you could bond over.

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So while your hardened professional instincts might implore you to try to wave off the anxiety hanging in the air and attempt to proceed with your status report, deck presentation, or sales pitch as though nothing odd was happening in the wider world, I think you're going to have a much easier time, and likely a more productive time too, if you go the other way and acknowledge the weirdness front and center.

Your client is a human being, just like you, and this pandemic experience has dealt them just as much nightmare fuel as it has you.

What's more — and this is a fact too easily lost in professional discourse — both of you are human beings **first**, and workers second.

You are a human being more primally and primarily than you are **any** of the roles you play: worker, parent, sibling, friend, musician, painter, tennis player, amateur botanist.

"You" are not the sum of these roles and interests.

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You are a mortal animal who needs to feel secure, loved, understood, connected, and you need these things as prerequisites to playing **any** of your roles, or pursuing **any** of your interests.

Your client is the exact same way. So in all of your communications with them, start there.

Ask your clients how they are doing:

- How they're managing the work-from-home shift.
- How they're handling the stress.
- What they're doing to cope.
- What kinds of fun they're managing to carve out for

themselves when time permits.

Share some of the challenges you've been facing and some of the things that have been helping you get through.

If it comes naturally, follow whatever little thread these conversations give you to grab onto, whatever you and your client discover you have in common amid this, be it cooking projects, the strange wonder of using Zoom to socialize, Jackbox games, Tiger King, etc.

Small talk has probably always constituted the intro phase of your client conversations, so just make your small talk a little less small.

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Talk a little longer and with a little more interest in what this experience is doing to you both, as human beings.

You can trust yourself to still know the difference between this and a chat with a friend or family member.

You'll still know what lines not to cross.

This is perhaps the tip that has served me best in all my years of working this way.

I have most definitely gotten more real with my clients in recent months, but I have always tried to be my whole and sincere self in all my communications, and so my clients have consequently always seen me as a human being first and a vendor second.

I tell them about my bands' new album releases and my wife's print publications.

I tell them when I've been grappling with insomnia, or when I made a really great pot of chili over the weekend.

This isn’t a contrivance on my part; it’s how I am and how I live, and a reflection of my larger efforts to be my whole integrated self at all times.

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But it has the effect of signaling to my clients that I’m a regular person and not a walking, talking sales agenda.

I’m showing them who I am outside of work so that they can see that I don’t live to extract money from them.

I’m not eternally working a playbook full of maneuvers engineered to retain and upsell them.

I’m just a person talking to another person.

This is the surest way to close the distance between you and them, to make your changed physical workspace irrelevant, or at the very least, much easier to take for as long as you have to take it.

Don’t get me wrong: it’s not that I **don’t want** to retain and upsell my clients.

My agency does better if I do, and I stand to earn a bonus as well. It’s not **not** a goal of mine.

It’s just that it’s not **the primary** goal.

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The primary goal is to do the best work I can for them as part of the engagement that they’ve already paid for, and to speak to them in a respectful, sincere, person-to-person way throughout that same engagement.

So as eager as I might be to expand and prolong an engagement, I feel hucksterish and manipulative when I allow that eagerness to drive my conversations with them.

Instead, I grab hold of that eagerness and I channel it into the work itself. And that brings us to my second tip.

Tip 2: Delight With Your Work, Not With Your Words

UpBuild is perhaps an unconventional agency for the fact that we don’t have an account management layer.

Engagements are led in virtually all cases by a Senior Marketing Strategist, who both manages all comms and is the primary author/editor of all deliverables.

In fairness, I think this structure makes my next tip easier to practice than it would at an agency with dedicated account managers who often don’t get a chance to review a completed deliverable until one day at most before the promised ship date.

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But I believe the tip is valuable enough to be worth shaking up a process for.

And though it could not possibly sound simpler, it’s also a powerfully illustrative reminder that **simple** and **easy** are not the same thing.

I’m talking about doing the best possible job on every single piece of work that you slide across your client’s desk.

Don’t rest on a piece of data analysis until you have anticipated, and preemptively answered, every question large

and small that your client could possibly ask about the number you're putting on display.

Imagine a toddler ceaselessly asking "why?" and don't stop drilling into that number until you truly run out of whys.

Example:

- **Why did the site's ecom revenue fall year-over-year?** Because there was a new product release during this quarter last year, and this past quarter had no answer for that.
- **Then why didn't traffic fall along with revenue?** Well, traffic from email and organic search actually did fall, and those were the channels most closely associated with sales of the new product last year, but those losses were offset by a new flood of traffic from social media, which came in to read a new blog post on a popular topic but didn't convert into many sales.
- **Why not?** In part because the topic of the post was not easily relatable to any of your products, and in part, because the blog has historically not done a great job of feeding your conversion funnel.
- **What we can do about it?** Well, for a start, we can test adding some mid-post CTAs to your blog post template; for another, we can reconsider your content strategy and determine together whether it's worth it to write posts like this if the traffic they bring in doesn't do anything for the bottom line.

And on and on like that.

Imagine this dialogue with your client in your head so that you don't have to have it with the clock running, and write down your final answers for every question you would expect them to ask.

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Don’t rest on a research project until you are certain that you have covered every angle that your client might realistically deem pertinent.

If you’re talking to a new lead, learn everything you can about their business needs and where your contact sits in the hierarchy organized to service those needs, and figure out how that person could most benefit from your help.

In short, use your knowledge of your client – of their day-to-day work experience, of their character and personality, and above all of what **their** bosses expect of **them** – to identify the needs behind their needs, and then fulfill those deeper needs.

Figure out how you’re going to make their jobs easier. Peel every onion, every time.

You can do this just as easily from home as you could from your office – none of that newfound isolation and vulnerability needs to disturb your desk work.

(Sure, you’ve got new distractions to deal with here at home, but the open office plan that you have almost certainly gotten a reprieve from offered up plenty of distractions of its own.)

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Why is such a seemingly shallow bromide like “do a good job at your job” worth stating out loud?

Because it’s the best possible way of retaining and upselling.

In my experience, these tasks are accomplished not by charm nor guile, but by becoming indispensable and providing the client with work so superb and with such unflagging

dependability, that they get to a place where they could not imagine doing their jobs without you standing behind them.

Deliver work on this level, and any client who is capable of recognizing your contributions and who has any control at all over their company's resources will make sure that you stick around, and if possible that you be entrusted with more responsibility, since you've already proven yourself so capable.

That is how it works.

Rewards like a renewed or expanded contract are not won, but **earned**.

You have to roll up your sleeves and keep them up.

Tip 3: Tell the Hard Truths

Every one accustomed to agency or private contractor life knows that no matter how well you connect with your stakeholder, and no matter how strong your delivered work is, nothing can guarantee that your client's company will actually see a needle move as a direct result of your services.

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The list of constraints and obstacles on the client's end that can get in the way of success is too long to even consider trying to produce in full, but here are a familiar few:

- Internal bottlenecks or jammed communications keep your recommendations from getting implemented in a timely way (or at all!).
- New initiatives and/or changes in focus emerge at the company, handed down from on high, that force sudden stoppages or pivots where your work is concerned.

- Your stakeholder's boss doesn't understand the value you provide – through no fault of your stakeholder's – and shrinks your budget when *the**i**r* boss puts out a call to reduce spend wherever possible.

If you're paying attention and have sufficient insight into how things work at your client's company, you are bound to have moments in which you realize that the company has gotten in their own way.

In these moments, your duty is to tell them as much.

Not to equivocate, not to shoulder the burden, and not to ignore the problem and hope it fixes itself, but to address them – one human being to another – and give them the straight dope about what's going on.

It's the only respectful thing to do, and, just like doing the best work you can do, it isn't any harder to do from home.

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If there are things that your client needs to be doing to implement your ideas, but they aren't doing them, you can definitely find a kind but firm way of saying so.

> *"I don't believe it's wise to proceed with this second project until all the approved ideas from the first project have been enacted, because the second project won't give us the full lift that we desire unless and until all the necessary groundwork has been laid by the first."*

Mention it as soon as you spot the pattern so it's clear that you're saying it in their best interest, and not just looking for a way to displace your responsibility when you have no new ideas or playing the blame game over a bad quarter.

Be polite, of course – that hopefully is how you were raised and not something you need a blog post to encourage in you. But be honest.

If a budget cut has made it impossible for you to keep supplying the same goods at the same pace that your stakeholder has gotten used to, you can definitely find a way to let them know without making it sound like **your** grievance.

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> *"Now that our monthly retainer has been reduced from 32 hours to 20, we should have a fresh talk about this engagement's priorities and how we can make best use of those 20 hours."*

That is eminently reasonable.

If a bunch of new developments inside the company are forcing a reshaping of your original scope of work, you can definitely find an accommodating and understanding way of broaching that subject in a spirit of collaboration

> *"Sure, I can help you with this thing that your boss dropped into your lap on short notice, but we should talk about how much of a priority it is relative to the other projects we're slated to work on in the next month, and revise all deadlines accordingly."*

This is you sticking up for your original scope of work and the responsibilities to your client that you **already** agreed to take on, before you learned about this new one.

Here's an analogous scenario for a new lead.

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If, after some initial back-and-forth, your prospect tells you that they like everything about the engagement as you've proposed it, but are hoping you'll find it in your heart to reduce the asking price (without reducing the proposed service level, mind you – and this **does** happen), you can absolutely find a courteous way of explaining to them that you cannot, because either you or your agency places too much value on your time for that.

> *"I appreciate that this price point might appear high, but between the cost of the tools that are required to perform these tasks and of the time that it will take for me to use these tools and do the ensuing analysis and presentation, the asking price does accurately reflect the total cost of the work as described."*

This is a chance to demonstrate respect both for your client and for yourself.

The Ticket Is Sincerity

The qualities that make for a good relationship between a vendor and a client are the same ones that make for a good relationship between two colleagues at the same job: mutual respect, and – as an outgrowth of that – trust.

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The difference, of course, is that since a client pays a vendor and can stop paying whenever they wish, the burden of building that respect and trust falls entirely on the vendor, and it must be cultivated, renewed.

The quality above all else that enables this is sincerity.

When you start your conversations on the phone or over Zoom by

asking how your client is holding up in today’s atmosphere of tension and uncertainty, and sharing how you’re faring, you’re being sincere in establishing a human connection.

When you prepare a deliverable for submission and go every extra mile that you can spot, you’re being sincere in your efforts to give them the best work their money can buy.

When you tell them something that they don’t **want**, but **need**, to hear, you’re being sincere in your devotion to the truth, even when it’s difficult.

Sincerity, this most ennobled of human qualities, which creates the most rewarding interpersonal relationships, also creates:

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The sturdiest professional ones, the ones likeliest to go farthest and longest and give both you and the client the most satisfaction.

The easiest ones, the ones that can sometimes create a bright spot in a dreary workday, because you relate on a human level and therefore actually enjoy talking to one another.

So long as you and your client are both working at all, no global panic can take that connection away.

And that connection could end up being one of the things that helps pull you through.

More Resources:

http://tracking.feedpress.it/link/13962/13692718