

Creating the Dream Team of Business Retention

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One of the essential elements of a systematic, sustainable business retention program is the creation of a team of service providers dedicated to quickly and professionally responding to the needs of employers identified by the outreach specialist during a one-on-one meeting with the business owner.

Creating a unified team from disparate, autonomous service provider organizations is, however, easier said than done – and this challenge typically holds true in any community. Like any team-building process, it can take months for the team to overcome obstacles, differences and suspicions before it coalesces into an effective, customer-focused team.

One of the major challenges in creating a strong team is dealing with team members who do not fulfill their commitment to the team. This article examines ways to deal with this challenge and create a “dream team” – one totally committed to achieving superior customer satisfaction through timely delivery of needed business assistance.

In a best practices business retention system, one or more professional outreach specialists serve as the link between employers needing assistance and the team of service provider agencies who deliver assistance when needed.

A key skill for any outreach specialist is the ability to foster team spirit while catering to individual egos on the team. Outreach specialists must be sensitive to reality – the team of service providers consists of autonomous economic, workforce and community development agencies populated by many different types of people with differing egos and agendas. These agencies are not accustomed to teamwork or taking direction from someone outside the organization.

There will be agencies and individuals who are customer-focused, cooperative and quick to embrace their role in the retention program. Unfortunately, there will also be agencies and individuals who express a willingness to participate but whose actions fall short. These individuals do not communicate well with the outreach specialist, they are



slow to respond to customers and they do not provide any feedback regarding the pre-qualified lead and the services delivered.

What does the outreach specialist do when passing a referral to a non-team player?
How can the outreach specialist ensure quick and efficient follow-up by an agency that doesn't have a good record with previous customers?

Certain steps can be taken to strengthen the process – and create a highly responsive “dream team.” The action begins when the need is identified and pre-qualified during a CEO interview.

Step One: Gather thorough, concise information.

To avoid confusion by the agency receiving the pre-qualified lead, the outreach specialist must be diligent in asking probing questions to further qualify the need that the CEO is explaining. Gather as many facts as possible during the initial interview.

For example, if a business owner expresses a need to train workers in quality control, the outreach specialist should ask the “next logical question” in an effort to learn more.

Have you done any type of quality training before? If yes, did your firm use in-house staff or outside trainers?

What was the scope of the previous training: How many were trained? How long did the training program take? Was the training effective, in your opinion?

Do you have a product quality program in place right now?
Are you ISO certified or are you looking to become ISO certified?

Have you solicited bids on the current training? If yes, what is the estimated cost?

Do you want a customized program or do you simply want to know what type of quality training programs are out there?

How many people do you want to train?

Do you want financial assistance? How much are you seeking?

When do you want to start training? When do you want to complete training?



This is just a sampling of the types of questions that should be asked. The objective is to pre-qualify the lead and provide as much useful information to the service providers responding to the lead. It enables the outreach specialist to identify a specific action item for the service provider that's more detailed than simply a basic "company needs workforce training" lead.

The service provider is more likely to follow-up promptly with the customer if he or she knows the precise nature of the CEO's request.

Step Two: Do not give the CEO a timeframe for follow-up.

Because you cannot predict the timeliness of the response by your partner, it is best not to make any promises to the CEO regarding a timeframe for follow-up.

It's better to tell the CEO that you will notify the appropriate service provider immediately and that he/she will promptly contact them with assistance.

Then, make sure that the service provider responds. With experience, you'll will be able to identify service providers who are diligent in follow-up and those who need to be monitored.

Step Three: Send referrals ASAP.

How can an outreach specialist expect prompt follow-up from a service provider if the outreach specialist is not distributing referrals in a prompt and timely manner?

Corporate profiles developed during the one-on-one visit with the CEO should be complete and available to the team within 24 hours of the meeting... and all pre-qualified leads resulting from the meeting should also be forwarded to the appropriate service provider agency within 24 hours of the meeting.

The outreach specialist must lead by example – forwarding referrals promptly and requiring that service providers be equally prompt in responding to referrals.

Step Four: Communicate with your team members.

Ongoing, regular communications – above and beyond the distribution of pre-qualified leads – is a critical component in creating and maintaining an effective team. Take time to ask each service provider a few pertinent questions.

Are the referrals that are being forwarded clear and concise?

Are they viable projects?

Is enough information being gathered to help you do your job?



These types of questions will help the outreach person do a better job, emphasize the importance of each team member and demonstrate a “team” attitude.

It is also important to explain to service providers that timely follow-up does not mean actual delivery of services – it means a prompt follow-up phone call to the CEO, acknowledging the need(s) and requesting a follow-up meeting to begin the service delivery process.

A good outreach specialist is a coach and motivator. Periodically check with each agency on the team to determine the quality of the pre-qualified leads. Keep the team members motivated and eager to respond to leads.

Step Five: Double-check the communication system.

Even if your team has a pre-determined means by which referrals should be sent, double-check the system early in the program to ensure that there are no bottlenecks.

For example, employees at one agency on the team may not have personal e-mail accounts. Referrals could become lost when they are sent to an organization’s ‘general’ account. A check of the system may reveal that voice mail is a better communications device for this agency.

Always avoid phone tag and illegible fax memos. Use the same communications technology that your customers use to communicate – email. Develop an email directory of all service providers and distribute it to all members of the team. Use email regularly, setting the example for the team.

The bottom line? Make sure the communications system between the outreach person making referrals and each agency receiving referrals is working to maximum efficiency.

Step Six: Document follow-up activities.

Any business retention program that is truly focused on customer satisfaction will document all follow-up activities. A log, whether computerized or manual, serves as an effective tracking device. Outreach personnel making referrals need to know when messages are left, e-mails sent, responses received and actions are taken and by whom.

Final Step: Eliminate the non-performers.

This recommendation may be politically unpopular but the retention team must ask a more important question: how important are the employers who are investing in our



community, paying taxes and employing area residents? If a community is truly serious about business retention, the answer is an emphatic *Our employers are our priority*.

By conducting routine follow-up with customers, it will be easy to determine if a member of the team is not performing – customers will be quick to complain.

If a service provider cannot provide adequate customer service, it's time to find another agency that can – and many “second team” economic and community development agencies will lobby for a spot on the “first team” when a community operates a successful, high visibility business retention program.

The Bottom Line

Strong, responsive business retention teams do not happen by accident. In any setting – whether sports or business – it takes time for a team to evolve and reach its full potential.

Outreach specialists play a key role in the evolution of a business retention team. Those who know how to nurture and “coach” agencies and individuals on the team can more easily – and quickly – create a retention “dream team” – one that's willing and eager to respond to the needs of the community's existing wealth and job creators.

About the Author Del Birch is a founder and principal in ExecutivePulse, Inc., a consulting firm specializing in business retention and customer management for economic, community and workforce development. Del is a long-time BR&E practitioner, having conducted hundreds of BR&E visits with business owners of large and small firms, manufacturing and non-manufacturing firms, and firms located in urban and rural areas in Northwest Pennsylvania. He works with clients throughout the United States and Canada; he provides business retention training for the professional certification program sponsored by the International Economic Development Council (IEDC).

