



PRINCIPLE 6 | Any Monkey Can Survey, Start Building Relationships with Customers

Guide to Conducting Quality Conversations

Key Characteristics of a Quality Conversationalist

- Natural conversationalist
- Appreciates and values customer relationships
- Empathetic
- Open to listening to challenges
- Skilled at both verbal and written communication
- Disciplined in scheduling/managing calendars
- Sales-oriented and focused on business growth

BEST PRACTICES

Conducting a Quality Conversation

1. Create a calendar
 - Based on the timeline for conducting calls, schedule time for the initial outreach, Quality Conversation, and any necessary follow-up.
2. Develop Quality Conversation starters
 - Quickly review the [customer feedback] survey results to determine target areas for follow-up and draft questions to ask during the conversation.
3. Email customer to secure ten-minute call
 - Write a short thank-you email and include some of the areas you would like to talk about.
4. Make a follow-up phone call
 - If the customer has not responded, call to let him or her know about the email, reiterate thanks, and give him or her an idea of what you want to talk about.
5. Conduct the Quality Conversation
 - Ask questions to identify or learn more about strengths and areas for improvement. Listen attentively and capture notes [in task management program]. Ask “What Else?” “Who Else?” to obtain other opportunities and potential referrals.



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6. Set expectations for follow-up
 - Thank the customer and let him or her know when you will reply with an update or a resolution to any problems and/or to obtain referrals.
7. Develop action plan based on customer feedback
 - Work with the appropriate internal resources to address any identified issues and establish a timeline for resolution. Capture plan in task management program and publicly share any identified successes.

Following up on leads

1. Enter leads from call into your company's tracking software.
2. Follow up with a reminder to obtain additional leads (as necessary).
3. Follow up with referral source with a thank-you note.