Customer-Facing Tips and Tricks

Helpful tips to keep In mind for customer engagements

GUIDELINES FOR KICK OFFS

- Come prepared for the engagements you'll be managing. This includes but is not limited to:
  - A general understanding of our client's industry and GTM message
  - A feel for what the client is trying to achieve with this campaign
  - Participation in the internal kick off call and a thorough understanding of the transfer/ canvas/SOW
  - Awareness of previous work the client has done with TSL as well as future work planned
  - Knowing and introducing the comprehensive TSL team assigned to support this customer (Sales rep, CJ Manager, Strategist)

GENERAL GUIDELINES

- Be reliable. Work with the Production and Strategist teams to ensure we are meeting agreed-upon deadlines
- Be organized. Compile and send an agenda for all calls as well as a follow up summary (if applicable)
- Ideally a call agenda should be provided AT LEAST 1 hour in advance of the call
- Communicate. Keep the client in the loop on everything. This includes:
  - Unforeseen delays
  - Timelines and deadlines- PMs need to provide project outline (Gantt) or a project summary that details what is due when and from whom
- If a deck/presentation is being prepared for the client to see, please be sure to QA before putting in front of client (by PM or Jenni)

GENERAL GUIDELINES

- Make it a habit to check your schedule for "tomorrow". If there are checkpoint calls scheduled with customers that are not needed, cancel and provide a detailed explanation. **NEVER** cancel a customer call within an hour of the meeting, even if there are no updates. Use the time to ask questions, see if they need additional support or have questions of their own.
- Make sure you are taking your calls from a quiet environment. Distracting background noise and/or low quality audio can come off unprofessional *to our clients. When possible, extend this courtesy to Internal calls as well.*
- Follow Best Practices to share your screen. Guidelines are posted in the Projects Channel from Holly on how to share a window.

DURING CALLS

- Speak with confidence on the tactics you are managing. Come prepared to discuss the following with the client:
  - The input you need from them
  - Turnaround time and deadlines for deliverables
  - What they can expect during each phase of the project
- Pause and ask if there are any questions from the customer, especially when you are kicking off a tactic or running a call with one of TSL's technical SME's. Know your audience and their experience (or lack thereof) in this realm. Your SME may need you to chime in during technical conversations and help them pause to ensure comprehension from our customers
- Let the customers contribute on the call. They need to speak for you to understand more about the go to market message and what they're trying to achieve with this tactic.

DURING CALLS

- Don't let the customer take over the call. Make sure you get what you need in order to be able to set the Production/ Strategist team up for success.
- Be professional. If you are remarking on a customer's previous marketing efforts, be cognizant of the effort they put into that. There is a way to give productive and constructive feedback while still getting your point across.
- **Ensure that either you or the strategist elaborates on the results you're presenting. TSL should be painting a picture for the client as to why these results are how they are. Give recommendations for optimization (if applicable). If results are lackluster, make sure you're conferring with the Strategy team and gathering recommendations on how we should be adjusting to achieve the desired result**

QUESTIONS