Relationship Mapping Exercise

This is an exercise used to drive multi-threading in account and create a plan in order to develop & nurture the right relationships.

PURPOSE

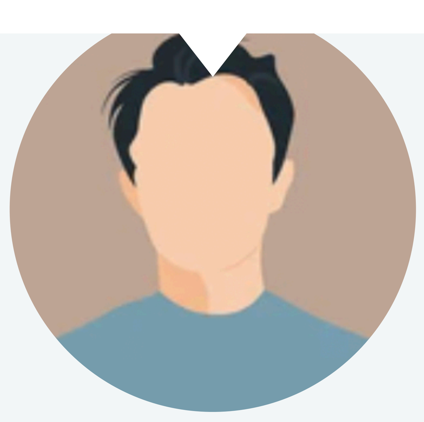
A relationship map is a valuable sales tool that be can be used to identify, engage, and grow your account. There are five critical questions to ask on each of your top accounts when it comes to your relationships:

- Who are the key decision makers at client and agency?
- Who are the key influencers? How influential are they?
- Who are/can be your key champions?
- Who are/can be detractors?
- What actions can you take to grow engagement?

PLAYERS

As a first step in relationship mapping, take time to reflect on the key players for each top account. You'll need to identify who know well, who you need to know better, and who don't know at all. Here are some dimensions of each relationship you'll need to consider:

Influencers

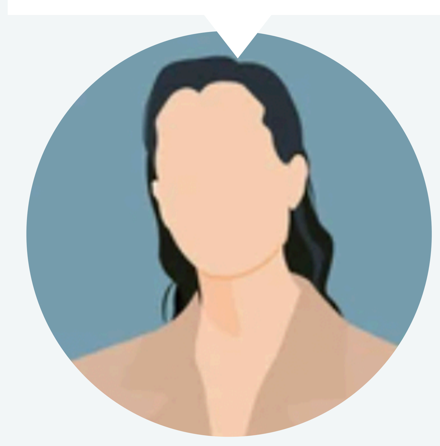


Who has the most say on the future of your partnership? They can also help educate you and drive adoption.

Leaders

Who are the executives who have the power to raise concerns or put up roadblocks?

Decision Makers



Who controls the resources? They can drive action towards results.

Budget Holders

Who has the financial stake?

RELATIONSHIP FACTORS

Detractor

Who has created roadblocks or friction for your cause?

Supporter

Who is on your side but not taken action for your cause yet?

Champion

Who is actively advocating for you?

How to create a relationship map

STEP 1

Define vision

Define the vision for the account, determine if your team is aligned, understand your client's perspective on this vision, and identify roadblocks and opportunities.

STEP 2

List the players

Identify the influencers, leaders, decision makers, and budget holders. Include their name and title.

STEP 3

Rate the relationship

Reflect on the strength of each relationship. Rate the state of the relationship. Is it strong, good, or weak?

STEP 4

Determine gaps

Reflect on each relationship and determine how you can nurture each one. Leverage the questions below to help you create a strategy to foster each relationship.

STEP 5

Create a plan & activities

Identify an actionable plan to move the needle on your relationship. Ensure you block time in your calendar to nurture these relationships.

Pro-Tip: Partner with your main contact to identify key stakeholders, ask for an org chart, and get curious (start asking who is who).

Prompts to help you determine how to nurture your relationship

Motivation: What motivates your stakeholders?

Goals: How can you help them achieve their goals more easily (especially in ways that they haven't thought of before)?

Needs: What do you need from them and what do they need from you?

Success: How is your success linked to theirs?

Course of Action: What is your course of action to develop these relationships? How else can you develop them into champions?

Activities to help you nurture your relationships

Brainstorming Session
Host a brainstorming session to uncover challenges and potential solutions

Educate & Inspire
Share useful information (articles, case studies, videos) or arrange a training session that helps them use your services more

Share Momentum
Send updates on things you're working on, highlight what's happening (when & why), and what's next

Get Social
Get to know your clients. Host a virtual lunch or coffee chat. Leave thoughtful comments on their social media points.

Don't forget to identify how to leverage your manager or senior leadership internally to navigate and nurture your client relationships.