



CREATE | AUTOMATE | OPTIMIZE

SATISFIED CLIENTS

- Onboarding & Expectations ✓
- Defined SOWs & Project MGMT ✓
- Frequent Communication May
- Budgets & Contracts June
- Repeat Work July

A person's hand is visible, pointing directly at the camera. The background is a solid blue color with a faint, darker blue silhouette of a person's head and shoulders. The text is centered on the blue background.

How **NOT** to tell a client to
F%#K off

A lesson in how
**Automation is not always
a good thing**

TODAY'S AGENDA

Thought Leadership Series

Effective communication is 20% what you know and 80% how you feel about what you know

Introductions



Listening vs.
Comprehension



Frequency



Content



Tools & Resources

THE PANELISTS



John-Mark Bantock



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**“The single biggest problem
in communication is the
illusion that it has taken
place.”**

– George Bernard Shaw



Catalyst Pillars of Communication



Listen

Verbal, Non Verbal, Written, Visual

Stakeholder interviews, Written Questions, Visual Queues, diagraming



Engage

Tell Stories

Anecdotes, testimonials, use cases can open up new lines of thinking



Question

Leading Questions

Ask open ended questions that encourage clients to provide details



Comprehend

Synthesis of what you have heard

What clients say isn't necessarily what they mean.

CLIENT ONBOARDING – STAKEHOLDER INTERVIEWS

The screenshot displays the Catalyst Connect web application interface. At the top, the navigation bar includes the Catalyst Connect logo, a breadcrumb trail (Home > Intake & planning > Quotes > Projects > Billing > Our Meetings & Learning Center...), and a user profile dropdown for John-Mark Banto. Below the navigation bar is a horizontal menu with five main sections: Intake & Planning, Quotes, Projects, Billing, and Our Meetings & Learning Center. A left-hand sidebar menu lists various organizational categories, with 'Execution' currently selected. The main content area features a progress indicator with two steps: 'Overview' (active) and 'Personnel'. Below this, there is a 'Video Link' section containing a video player and a text block. The text block discusses digital transformation templates and Zoho ONE implementation. A 'Download' button with icons for Word and PDF is located in the top right of the main content area. A 'Reorder' button and an 'Add a field' button are positioned above the video link section. A plus icon in a rounded square is visible in the bottom right corner of the main content area.

Catalyst Connect | Home > Intake & planning > Quotes > Projects > Billing > Our Meetings & Learning Center... | John-Mark Banto...

Intake & Planning | Quotes | Projects | Billing | Our Meetings & Learning Center

Download | Word | PDF

Org Profile
Brand Guidelines
Strategy
Execution
Customer Lifecycle
Diagrams
Docs
User & Permissions
CRM
Books
Inventory
Campaigns
Sales IQ
Social
Website

Overview | Personnel

Reorder | Add a field

Video Link

Over the years we have developed a best practice template for helping organizations with their digital transformations. Even the most tech savvy organizations today struggle to manage a myriad of apps and service providers as the endeavor to optimize their web presence. We have made the process easy by providing an end to end recommendation as to how to operate in the Cloud with the one of the more centralized platforms in the market, Zoho ONE. As an implementation provider we offer many services from website development through Zoho consulting and API integrations. We therefore act as a single provider who understands your strategy and your entire tech stack thus helping to ensure continuity across all your web-based initiatives. Please note that most organizations will require some additional customization beyond the scope of what is outlined in this proposal.

EXPECTATION MANAGEMENT



Channel

Define your communication channels upfront and provide expected turnaround times.



POC

Ensure client has quick access to the appropriate point of contact for each issue that may arise.



Frequency

Proactive communication will always serve you well. No one has ever faulted us for over communication however a problem ignored is a problem amplified. Always be upfront and honest.



Archive

Archive all communication written or oral.

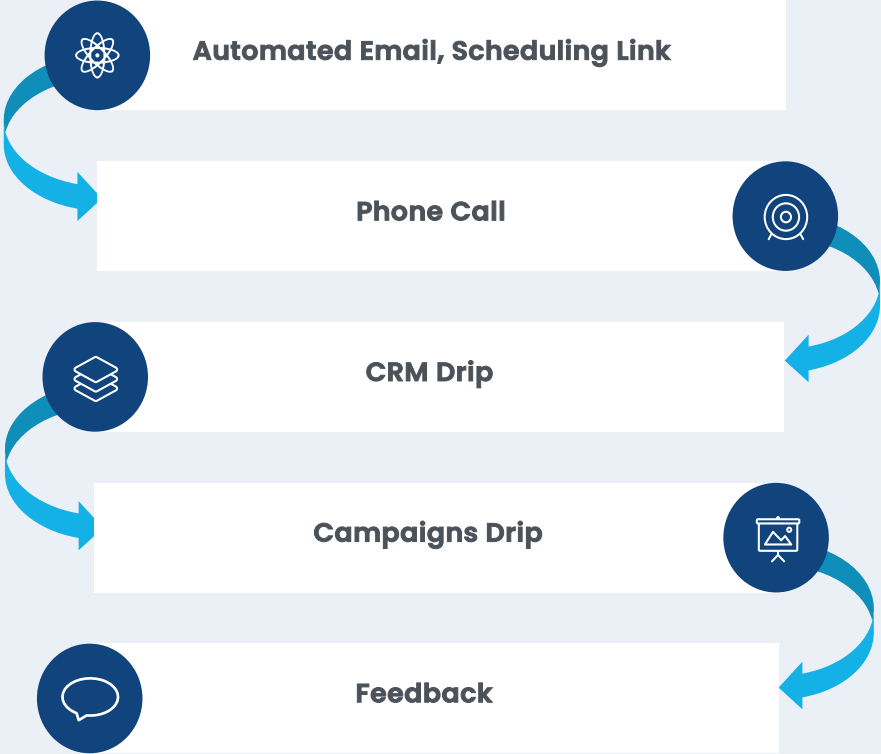


Access

Provide easy access to communication logs for the client

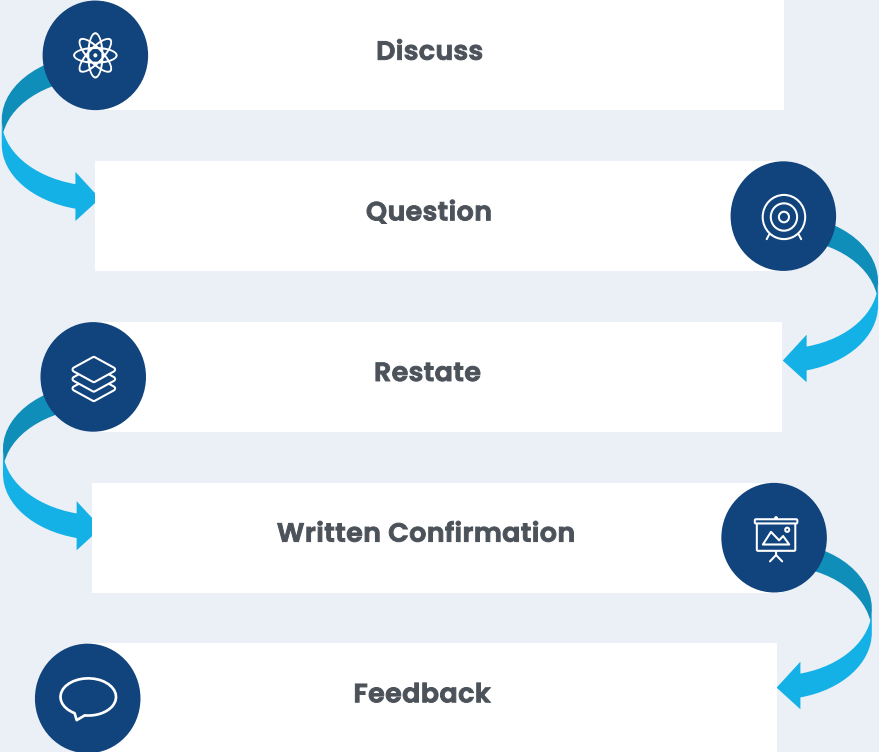
COMMUNICATION PROCESS FOR LEADS

Getting in Touch



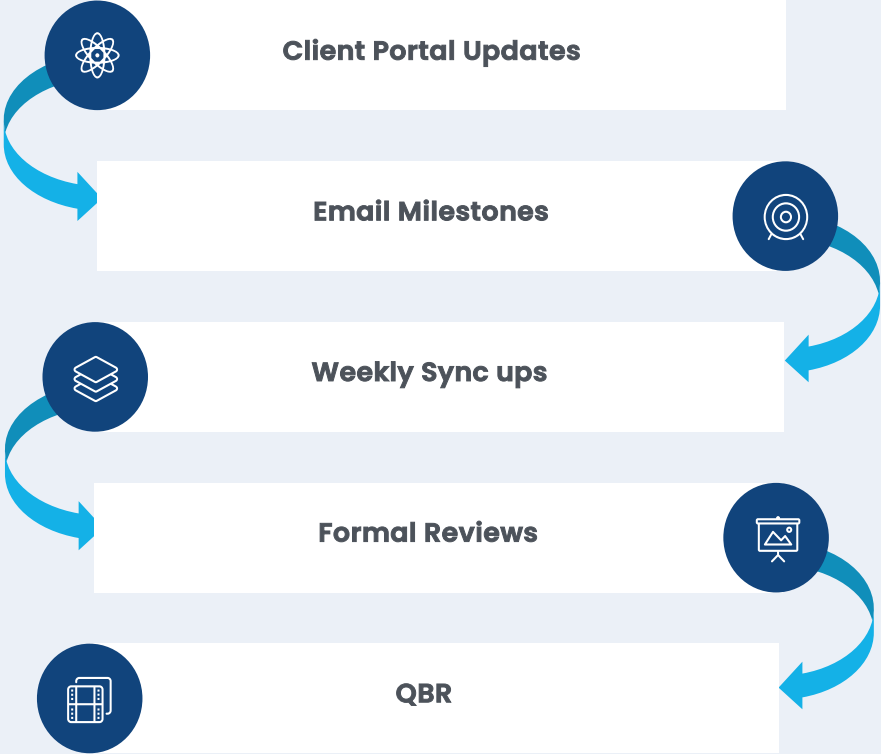
COMMUNICATION PROCESS FOR SOWs

Getting on the same page



COMMUNICATION PROCESS FOR PROJECTS

Getting on the same page



GOOD RESOURCES

- ✔ How to win friends and influence people, Dale Carnegie
- ✔ Exactly what to say, Phil M Jones
- ✔ Zoom Transcription or <https://fireflies.ai/>
- ✔ Client Portal, Catalyst Connect



**QUESTIONS
AND ANSWERS**

hello@catalystconnect.com

Slides/ Recording