



**Zoho
Partner Thought Leadership Series
Webinar**

August – Repeat Work

SATISFIED CLIENTS



Onboarding &
Expectations



Defined SOWs &
Project MGMT



Frequent
Communication



Budgets &
Contracts



Repeat
Work

THE PANELISTS



John-Mark Bantock



Peter Fuller



Brett Martin



TODAY'S AGENDA

Repeat Work

Zoho Partner Thought Leadership Series

How to structure an account management team that delivers excellence and encourages customer loyalty and repeat business.

Creating the Right Team



Weekly Check-ins



Building Rapport



Creating Brand Loyalty



Referrals

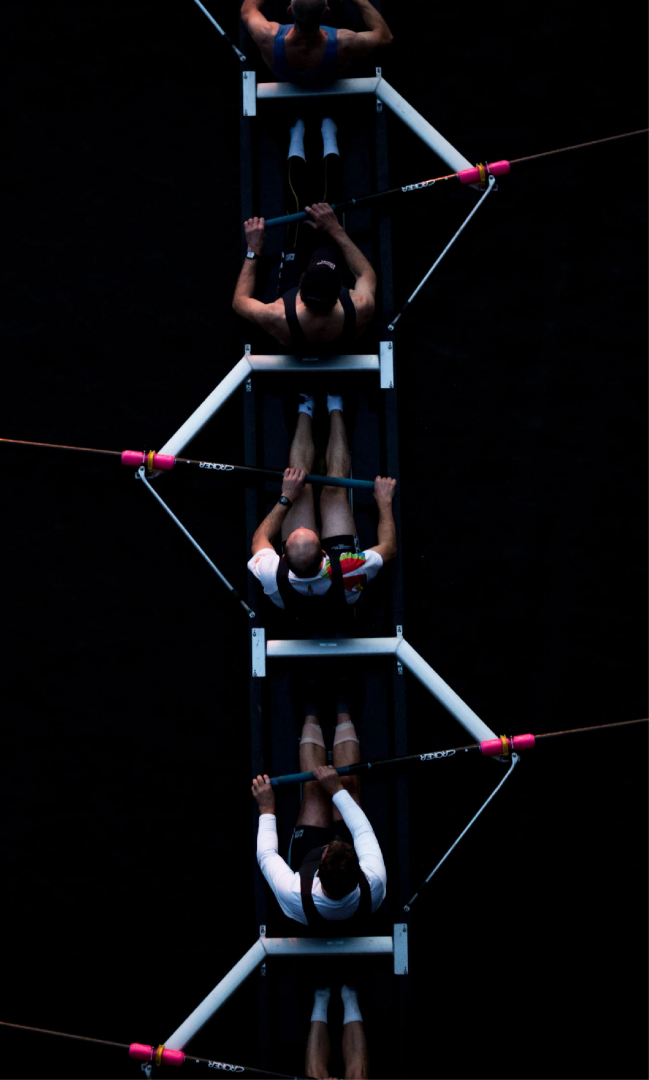
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The key is when a customer walks away, thinking, 'Wow, I love doing business with them, and I want to tell others about the experience.'

- **Shep Hyken**

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BUILDING THE RIGHT TEAM

Building the right team in the Zoho ecosystem isn't easy. Here's how we recruit and retain the right people.

 Recruiting

 Training

 Retaining quality employees(work culture, benefit package)

WEEKLY CHECK-INS

Weekly check-ins are an important part of building client rapport because they:

1 Identify potential issues early

2 Address scope creep and exceeding budgets

3 Allow employees to confidently execute work

4 Create feedback loop

5 Quick response

1

Check business pulse and pain points

2

Communicate applicable technical developments

3

Emphasize the benefits of treating tech as a continual investment in excellence

4

Bring management into the discussions for proper budgeting as you move forward

QUARTERLY BUSINESS REVIEW

What are the benefits of a Quarterly Business Review?

BUILDING RAPPORT

Building rapport takes time, but if you start from a place where you honestly want the best for your client and you take the time and energy to get there then it will happen.



Examples from Catalyst Connect, The Workflow Academy and Trailguide Technologies

BUILDING BRAND LOYALTY

I'm staying with Zoho, but why should I stay with the same Partner?

1

Deliver value – do what you say

2

Speak with clients regularly

3

Establish your brand in the community

4

Focus on excellence in customer service

5

Build authentic relationships, not ads

6

Examples from Catalyst Connect, The Workflow Academy and Trailguide Technologies

REFERRALS AND REVIEWS

A referral from every client and a client from every referral

1

High quality leads come from relationships.

2

Ask for reviews from your clients. Every review matters – negative reviews help you understand how to improve, and positive reviews help your ranking.

QUESTIONS
AND ANSWERS



Schedule a Partner Call

www.catalystconnect.com