Strategic Partners Service Model

It's important you manage the relationships you have with your Strategic Partners in the same proactive, professional way you manage your best clients. They're significant and can have a profound effect on the type of clients you attract and your future growth.

Service Model for Strategic Partners

Below is a sample of how you may want to service your Strategic Partners. It includes a variety of meaningful touches throughout the year, resulting in a touch point approximately once every two months.

We've provided a sample time line to illustrate how it could be spaced out throughout the year.

Lunch Meeting	Article of Interest	Annual Event	Relationship Call	Thanksgiving Card	Moment of Truth	TOTAL Annual Contacts
Annual	Annual	Annual	Annual	Annual	Annual	6
Jan	April	May	August	Oct/Nov	As Appropriate	
Q1	Q2	Q2	Q3	Q4	Varies	

You will notice that the **Moments of Truth** are the only service item which cannot be 'pre-scheduled' and instead requires you to pay close attention to what is going on in their business and life. A great way to identify opportunities related to Moments of Truth is to connect with them on LinkedIn. This professional network will send you automatic announcements regarding their work accomplishments, articles they've published, work anniversaries, and more. Resist the temptation to simply respond directly on LinkedIn with an email note of congratulations. Instead, especially for the significant accomplishments, deliver a personal card or note of acknowledgement the old-fashioned way which has a more meaningful impact and a longer shelf-life. When was the last time you displayed an email of 'Congratulations'?

Quality Versus Quantity

Make sure you have truly identified someone as a 'Strategic Partner' before you commit to this servicing of the relationship. It is not recommended you do this for those who simply qualify as a 'potential center of influence.'

This group is purposely kept small and exclusive to create results. As always, to ensure flawless implementation, have this organized and automated on your CRM.