Challenges and Best Practices in Identifying Client Needs, and how Business Development Addresses Them
Facilitators

• Tabata Fernandez
  — ITAM
  — Head of Business Development

• Sue Callaghan
  — Stayer Center for Executive Education, Mendoza College of Business
  — Senior Associate Director, Custom Corporate Programs

• Nicola Barrett
  — Darden Executive Education
Structure of Workshop

Part 1: Focus on **Challenges** of Business Development

Part 2: Focus on **Satisfying Client Needs**
Get to know your audience

Why did you come to this session?
What is your experience?
Do you ‘hunt’, ‘farm’, do both?

NEEDS

> Win Business
> Share BP
> Help Clients
> Nuggets to focus on clients
> “the latest”
Part 1: Focus on Challenges of Business Development
What are your challenges?

Challenges/Opportunities:

1. **Needle in Haystack - Opps**
   - Finding the right point of contact
   - Finding the right person to talk to (Decision Maker)
   - Land + Last programs

2. **Design** - Given enough vs. complete design
   - Retaining client relationship (Hunter mode)

3. **Passionate Prof.** - "Save my baby"
   - Professional ($) Prof.

4. **Mix of Reactive/Proactive to leads**

5. **True Value to org.**
   - Faculty members help sell

6. **Global organizations' solutions**
Challenges: First Small Group breakout

Challenge: Finding the Right Point of contact

- Profile the initial contact
  - Where are they in org?
- Identify pain points
  - the right pain points
- Get as far up the chain as possible.
- Build consensus around objectives and everyone is in full agreement. - ASAP
- Be inspirational so your clients have trust in the process.
Challenges: First Small Group breakout

Challenge 3: Needle in a haystack/finding opportunities

"Alumni Advantage"
Referrals
Internal Alliances
Inbound Marketing
Content Marketing
Alumni Outreach
Technology: LinkedIn / OneSource
Challenges: First Small Group breakout

Challenge 5: Design – How not to give it away!

- Know what you CAN do
- Qualify along the way
- Iterate
- Assess ALIGNMENT w/ client needs
- Establish strong RAPPORT/trust
- Know your faculty/product line-up
- Improved framing/expectations?? 4 might NOT work!!
- Custom = BS “I don’t believe you!”
- Do your best
- Charge for proposal/needs assessment?
Retaining Client Relationships

Zipper Model - tracking

Utilise university events/dinners
Feedback sessions - sales for next programme

See you throughout the process - visibility

Follow up reviews 6 months after
Challenges: First Small Group breakout

Challenge 8: Mix of Proactive v. Reactive to Leads

Proactive vs. Reactive

- Filters
- Strategic fit
- Faculty interest
- Revenue
- Alum
Challenges: First Small Group breakout

Challenge 9: Find True value of program to Org.

I.D. TRUE VALUE TO CLIENT

Value Proposition

START OF THINKING ABOUT - WHY U BASED PROVIDER?

Brand buying, for wrong reasons

Perception / Fear

Research angle

Outcomes

Practitioners (consulting) vs

Geographic Considerations

Cost

Consulting

Client Companies / Case Study

Faculty?

Safe, Brand Respected
Challenges: First Small Group breakout

Challenge 12: Off the Shelf solutions versus Custom – what’s the unique value proposition EE brings?

- OffShelf/Custom
- U.S.P.
- WE ARE the source of knowledge
- location/campus imp for some
- MBA (Cornell) “sell your company”
- blended models
- partner w/ other schools/univ.
- faculty + industry experts
Challenge 13: Global Organizations and Solutions

- Define Learning Experience in multiple locations
  - Solution: Web Ex / Teleconferencing
  - Virtual / On-site combination
  - Train the Trainer / Executives share experience
  - Integrate training w/ their Annual Conference
  - Individual need assessments for each geographic division to make sure the solution is applied successfully

- #1 - Understand needs of client first before identifying solutions
Challenges: First Small Group breakout and Report Out
Part 2: Focus on Satisfying Client Needs

Two Scenarios for Discussion:
A. Client “Knows What They Want”
B. Ambiguous request

- A.
  - Want: 5-day leadership development program
  - Who: Top 15 execs
  - Add’l: Working in global locations

- B.
  - Want: “Some development needed”
  - Who: High Potentials
Scenario A: Client “Knows what they want”

- Is this the decision maker?
- Tell me more...
- Where, how... online, classroom?
- Where does this fit into broader development activities?
- What is important for them to learn/change?
- Custom or Open?
- What is the relationship of participants?
- What are differences in divisions/goals/strategies?
- Why 5 days?
- How were these people selected?
- What impact do you want?
- What have you done in the past to develop this group? What’s worked? What has failed?
Satisfying Client Needs: Second Small Group breakout

Scenario A: Client “Knows what they want”

Best Practices: Satisfying Client Needs

- Knowing Client
- How/where/when/why blended?
- Tell me more
- Impact?
- Succession?
Satisfying Client Needs: Second Small Group breakout

Scenario B: Ambiguous Client

1. Ask about strategy
2. What makes the Hypo
3. What's your pain
4. What's your goal
5. Ask behavioral Change(s) from the past
6. How (measure) your success
7. Be aware of feasibility (outcome gap)
8. Feedback on previous experience
Scenario B: Ambiguous Client

- One thing different
- Where do you want to go
- Culture?
- Missing? Skills etc
- Up@ night- Pain point
- Payback- K/OJ Day
- Success?? Measurement of
- Definition of Hi.P.- How many
- $$?
- Who is the stake holder
- Other conversations?
- Priority of developments
- Where do you want the program to be held?
- Assessments?
- How serious are you?