



Lesson Two Pre-work and Follow Through

We hope you've have an opportunity to apply the principles and processes of Opening the Call. And we hope you've gained new insights about the power you have to set the tone, direction, and focus for service situations. Please come to the second session prepared to talk about one example of how you've positively affected customer relationships because of how you opened the call.

To help ensure that the next topic – **ASSESSING PROGRESS AND UPDATING THE PLAN** – is as successful and valuable as possible please print this document and...

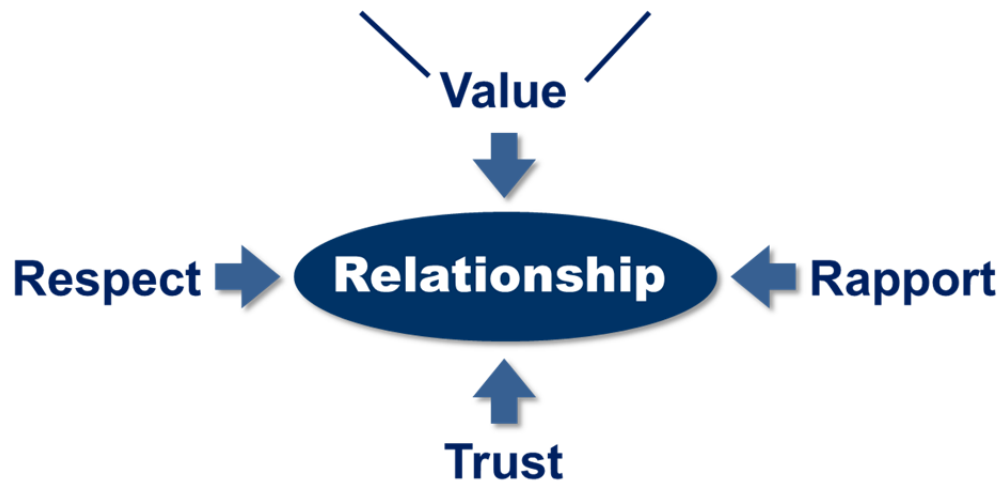
- Before the session read pages 2-3 and highlight the important points
- During the session use pages 2-6 to follow along and to takes notes
- **After the session, read page 7 in this document, Lesson Two Follow Through, and apply the guidelines in your post-session activities**

See you online!

Your Acclivus R3 Team

Understanding Personal and Positional Needs

- Webinar notes -



In business...

Everybody is under a lot of pressure

and

Everybody wants to look good

Assessing Progress and Updating the Plan

It is important to keep customers informed in order to keep them involved – and committed.

During the opening of the service call, a shared purpose is determined and a shared plan or process is agreed upon. Also during the opening of the call, initial expectations are established. To manage those expectations, we must keep the customer informed with regard to how well the plan is working and what progress, or lack of progress, is being made toward achieving the purpose.

Not knowing what has been accomplished, and what remains to be accomplished, prevents the customer from contributing to the process. Not knowing also creates anxiety and tends to produce tension in our relationship with the customer.

In addition, not knowing where things stand or what to expect places our customer contact in the position of not being able to keep others informed in his or her organization. So the tension that is produced may not be limited to the tension between us and our customer contact, and the negative repercussions for the relationship may extend far beyond the current service call.

The R3 approach for ASSESSING PROGRESS AND UPDATING THE PLAN is a proven 4-step process for ensuring that our customer contact is fully informed and part of the plan, and that we reinforce the relationship at every opportunity.

1. Assess/Explain progress
2. Reconfirm purpose and priorities
3. Update the plan
4. Listen/Probe for agreement

Assessing Progress

– Webinar notes –

1. Assess/Explain progress
2. Reconfirm purpose and priorities
3. Update the plan
4. Listen/Probe for agreement

Because customer attitude is closely linked with customer expectations, it is important to continually monitor and manage expectations

Assessing Progress

– Video notes –

1. Assess/Explain progress
2. Reconfirm purpose and priorities
3. Update the plan
4. Listen/Probe for agreement

Not knowing what has been accomplished
and what remains to be accomplished
creates anxiety and undermines the
customer's confidence in
you and your approach

Assessing Progress

– Video notes –

1. Assess/Explain progress
2. Reconfirm purpose and priorities
3. Update the plan
4. Listen/Probe for agreement

Through assessing progress and updating the plan, you continually reinforce the value of working with the customer toward a shared purpose following a shared plan

Lesson Two Follow Through

Congratulations on completing the second session of R3 Service: ASSESSING PROGRESS AND UPDATING THE PLAN. As you know, to complete the learning process, it is essential that you apply the principles and skills on the job.

Before the next lesson:

- Review pages 2-4 of this document and the notes you took during the session.
- Among your colleagues and in your personal life, make try to better manage expectations.
- For at least one service situation consciously apply the principles and skills of ASSESSING PROGRESS AND UPDATING THE PLAN and afterwards assess your own performance by asking yourself these questions:
 1. How completely did I apply the principles and the 4-step process?
 2. What went particularly well during these interactions?
 3. What would I change about how I assess progress with customers?
 4. What did I learn about ASSESSING PROGRESS and managing expectations?

Notice the effect that consciously keeping customers better informed has on your relationships. Notice the same thing among your colleagues and in your personal life.