



# **NAVIGATING YOUR BUSINESS & MANAGING YOUR CLIENTS THROUGH COVID-10**

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Notes from Open Forum Expert's Panel

*March 19th, 2020*

## Session Details

**Webinar Recording link:** <https://register.gotowebinar.com/recording/7595055095411705356>

**WSI Expert Panel:** Chuck Bankoff, Alison Lindemann, Cormac Farrelly, Francois Muscat, Neal Lappe, Jack Porter-Smith, Eric Cook, Caio Cunha

**Moderator:** Michael Monaghan

**Topics:** Working Virtually & Staying Productive; Navigating your Business Through COVID-19; Digital Marketing and Client Management in Uncertain Times; Considerations for Prospecting During Coronavirus; Communication Best Practices; Proactivity.

### Important Items:

1. Upcoming education webinars happening every day for the next two weeks, at 11am EST.
2. Virtual Digital Blueprint certification coming in early May.
3. Next Open Forum happening on Thursday, March 26<sup>th</sup> at 11am EST.

## Tips for Working Virtually and Staying Productive

- CB: Uses online scheduling link to avoid messing up his time zones
- CB: Uses a second screen to keep track of the things he wants to discuss with the client; helps him stay less distracted
  - Uses the first screen to share with the client, let's the client see what he's typing to keep him engaged
- CB: Uses a snowball mic for his virtual calls and a noise-cancelling headset
- CB: Uses a standup desk since he likes to move around
- CB: Has better meetings virtually than in person
- CB: Quality of the computer impacts the quality of the experience
- CF: Has a daily huddle with his team to touch base, added a video element to help the team come together
- NL: Set agenda in the meetings, do more research before going in, have a set of standard questions and have a strong command of whatever technology you're using (you don't want to look dumb in front of your client)

## Client Management & Digital Marketing Strategies

- AL: This is not that different than what we're already doing



- You want to be the person the client calls when they need something
- AL: Don't stop selling and marketing – show clients that you care about them. Leverage the relationships that you've already created with your clients
  - Focus on existing clients and those impacted the most – considering offering some free months of marketing help
- AL: Be aware of potential opportunities – rather than cancelling events, look at whether they can be done virtually
- AL: Share resources specific to their verticals and share business tips (small business loan opportunities, dangers of phishing scams, etc).
  - Attend BNI meetings that share info.
- AL: Don't stop selling and don't stop marketing – this will pass and you need to have a plan in place.
- AL: Doesn't think COVID-19 will have a huge impact on her business.
- CF: We need to be facilitators for our customers, and share information and knowledge with them
  - Help them use GTM or other virtual meeting technologies to replace their in-person meetings and sessions
  - Help them still be around in 6 months' time
- CF: Think about what's right for your client, not necessarily about what's right for us
- CF: It's unreasonable to expect campaigns to just carry on as normal, since the landscape has changed
  - Review social posts from the last 2-3 weeks and ensure they're still relevant and sensitive to the current situation
- CF: Use Google Trends for researching info for their clients
  - People have a better feeling about companies that are trying to help and that are sharing relevant information for their customers
  - It shows that WSI is relevant in a crisis and that we are not being opportunistic
- FM: Keep in touch and stay top of mind – you want to be there when the client is ready to re-start their marketing efforts
- FM: He has gotten 11 client meeting cancellations – but he is continuing to share their reports with them and using video recordings to explain what the information means
  - Showing them how to build their online reputation, how to build their LinkedIn profiles, doing site audits
- FM: Focus on both big and small clients, so you have a variety
- FM: If necessary, look at helping your clients allocate their budget to more important tools during this time, such as Zoom or GoToMeeting, or other communication channels
- JPS: While it's important to put our clients first, we also need to make sure that our business is healthy so that we can continue to provide support to our clients
  - We can't forget to look at what's going on at home
- JPS: Not focusing on COVID-19 when meeting with prospective clients and looking for clients that are still doing business (ie. rental companies)

- JPS: Important to have a diverse group of clients, to help reduce the risk
- JPS: We have put our clients into 3 buckets
  - Bucket 1: Crippled clients
    - Entertainment, sports, etc
  - Bucket 2: Spooked but not crippled clients
    - These are businesses that probably need to pivot to ecommerce – what are you doing to help them? What support can you give them to help them make the right choice?
  - Bucket 3: Clients who can prosper
    - These are essential services like warehouses, groceries, transportation, eCommerce
- CC: Hasn't lost any clients yet but has had clients reach out to see what's going on
  - His main focus right now is retaining customers
- CC: Working with a logistics company to finally complete a project they've been dreaming of doing for a long time
- CC: Customer in his region like the closer relationship and need the face-to-face meetings to close deals
  - That's difficult to do with COVID-19
  - Requires some re-education around the new normal

## Communication Best Practices

- NL: Our communication strategy has changed – the world has changed and what we say has to reflect that
  - Be empathetic
- NL: Share information on how companies can prepare to get back to normal life
- NL: Shifted focus to education instead of selling
- NL: More personal, less transaction conversations with clients
- JPS: With video, you have a lot more opportunity to get your message across
  - Your clients will also retain a lot more of the information
- EC: Be proactive and reach out to your clients – let them know you are here for them
- EC: Work with a lot of client in the banking sector and they had concerns about the status of their sites and properties
  - Drafted a statement to explain how WSI has experience in working virtually and that their website properties were safe
- EC: Sharing info with his clients on how to use their Sharpspring conferencing tools
  - Used Vidyard to record a walkthrough
- EC: Banks are supporting their local communities – buying gift cards from local companies, ordering food from local restaurants, etc

- Find out what others are doing to help so you can do the same
- EC: Created a business TikTok account – people are home, bored, watching videos. Why not step outside of our box and work on the business instead of in the business
  - Shows the importance of video

## Prospecting

- FM: Target eCommerce businesses, local rentals
  - Work ON your business, not IN your business
- JPS: focused on finding 2 clients for every one that has been lost
  - Don't forget what's going on at home (payroll)
  - Take the time to have a detailed plan on how to manage clients, and how to find new clients to manage
- CC: Look for businesses that are doing well in this environment – look for quick wins
- NL: Capitalizing on LinkedIn prospecting, email marketing and picking up a phone and calling
  - Also starting to use Vidyard a lot more – allows for that personal touch without breaking quarantine

## Proactivity

- CF: It's important to have a plan for your clients – but also for your business
- CF: Keep track of your expenses and cash flow
  - When you are responsible for a team, it's important to communicate early and clearly
- EC: Work on your business continuity plan