

## VEVA Client Relationship Checklist and Guide

As a VEVA, this checklist will be your helpful guide to ensure our clients get the best value service from us. By using this checklist properly, we can reduce **complaints, negative feedback, and end-of-services from our clients.**

**VE's Goal: Reduce the Churn rate and satisfy all our active clients by providing EXCELLENT SERVICE and increasing active clients.**

---

**These are some example questions you need to ask your client/s when a task is being assigned to you:**

- Could you please provide more context or background information about this task?
- What specific outcomes or deliverables are you expecting upon completion of this task?
- Are there any particular deadlines or timelines that I should be aware of for this task?
- Can you clarify the priority level of this task compared to other projects or assignments?
- Do you have any preferences or requirements regarding the approach or methodology for completing this task?
- Is there anyone else I should coordinate with or consult while working on this task?
- Are there any specific tools, resources, or software that I should use to complete this task effectively?

**Remember the acronym below to ensure that we are ALL delivering excellent client service to our clients:**

**PROFESSIONALISM** - Upholding professionalism in client interactions is essential for building trust, fostering loyalty, and achieving mutual success.

---

**P - Punctuality:**

**Being on time for appointments, meetings, and deadlines demonstrates reliability and respect for others' time.**

- Professionally conduct yourself at all times.
- Respect the client's time, preferences, and privacy.

**R – Respect:**

**Treating clients, colleagues, and stakeholders with dignity, courtesy, and consideration fosters positive relationships and collaboration.**

- Respond promptly to client inquiries, messages, and requests.
- Acknowledge receipt of messages even if a detailed response will follow later.

**O – Organization:**

**Maintaining a systematic and orderly approach to work, including prioritizing tasks, managing time effectively, and keeping accurate records, enhances efficiency and productivity.**

- Regularly evaluate the effectiveness of your services and client satisfaction.
- Be willing to adapt strategies or workflows based on client feedback and changing requirements.

**F – Focus:**

**Maintaining concentration, attention to detail, and dedication to tasks ensures high-quality work and optimal outcomes for clients and the organization.**

- Deliver high-quality work that meets or exceeds client expectations.
- Double-check for accuracy, completeness, and adherence to instructions before submitting deliverables.

**E – Ethics:**

**Adhering to principles of honesty, integrity, and transparency in all professional interactions and decision-making builds trust and credibility.**

- Keep the client informed about project progress, milestones reached, and any obstacles encountered.
- Share status reports or summaries at agreed-upon intervals.

**S – Skillfulness:**

**Continuously developing and honing expertise, knowledge, and competencies relevant to one's profession enables the delivery of high-quality service and innovative**

## **solutions.**

- Regularly upscaling or keeping yourself up to date with new trends and skills

### **S - Service Orientation:**

**Demonstrating a commitment to meeting client needs, exceeding expectations, and providing exceptional service fosters client satisfaction and loyalty.**

- Set realistic expectations regarding availability, response times, and working hours.
- Define the extent of services provided and any limitations.
- Agree on protocols for urgent requests or emergencies.

### **I - Initiative:**

**Taking proactive steps to identify opportunities, solve problems, and contribute positively to the organization's goals demonstrates leadership and initiative.**

- Anticipate client needs and offer proactive suggestions or solutions.
- Inform the client of any relevant industry updates, trends, or opportunities.

### **O - Open Communication:**

**Maintaining clear, honest, and respectful communication with clients, colleagues, and stakeholders fosters understanding, collaboration, and trust.**

- Request feedback on completed tasks or projects to identify areas for improvement.
- Actively listen to client concerns and address any issues promptly and professionally.

### **N - Neutrality:**

**Remaining impartial, unbiased, and objective in decision-making and conflict resolution ensures fairness and professionalism in all interactions.**

- Handle sensitive information with the utmost care and discretion.
- Ensure compliance with any non-disclosure agreements or confidentiality clauses.

### **A - Adaptability:**

**Being flexible, agile, and responsive to changing circumstances, client needs, and organizational priorities enables effective problem-solving and decision-making.**

- Having an open mind to see the bigger picture
- Understand the situation, and it's not about YOU
- Accept and be part of the CHANGE

**L - Lifelong Learning:**

**Embracing a commitment to continuous learning, growth, and self-improvement ensures relevance and competitiveness in one's profession and industry.**

- Grow your knowledge
- Don't hesitate to ask
- Attend mentoring programs
- Always seek better solutions

**I - Integrity:**

**Acting by ethical principles, moral values, and professional standards, even in challenging situations, upholds the trust and confidence of clients and colleagues.**

**S - Self-Management:**

**Demonstrating self-discipline, self-motivation, and resilience in managing one's workload, emotions, and professional development fosters personal effectiveness and well-being.**

**M - Meticulousness:**

**Paying careful attention to detail, accuracy, and quality in all aspects of work ensures thoroughness and professionalism in delivering outcomes and meeting standards.**

*Churn rate: the rate of clients ending their services*

---

## **Developing Effective Communication Skills**

**What to remember to avoid language barriers and misunderstandings in service delivery to our clients:**

- **Verbal Communication**
- **Active Listening**
- **Assertiveness**

- **Adaptability**
- **Clarity and Conciseness**

**Acronym = VAAAC**

**Emphasizing the importance of the following needs of each client from us:**

- **Dependability**
- **Empathy**
- **Responsiveness**
- **Reliability**

**Acronym = DEER**

---

## **Identifying the Different Types of Clients**

By understanding the different client types, we can deliver the best approach that drives results and foster long-lasting partnerships. Read each client type and understand the best approach to managing their expectations to ensure quality service and avoid issues.

*Reference: Indeed.com*

### **1. Uncertain clients**

Some clients may not know exactly what they want from your business. These clients may have clear ideas about what they don't want but struggle to figure out or tell you what they expect.

When handling uncertain clients, help guide them to consider the best approaches or factors for their business needs. Write down decisions after they you've agreed upon them and ask the client to review these documents to ensure that both of you understand the next steps.

### **2. Urgent clients**

Urgent clients often request quick deadlines for your deliverables or services. These clients may fear being late with their own dealings or projects and want to streamline your business faster than your capabilities allow. If your client is in a hurry to receive deliverables or services, ask them about their sense of urgency.

Find out if they have a specific assignment they're trying to complete and how rigid their deadline is. Explain to your client your own time constraints, such as operating times or projects from other clients. Work to develop a timeline with the client that is both realistic and feasible.

### **3. Unresponsive clients**

Sometimes, you might work with clients who do not answer your emails, phone calls or other communications for weeks or months at a time. When this type of client reappears, they may suddenly have a greater sense of urgency and request that meetings or project updates happen immediately.

To work with clients who have unresponsive periods, write down clear expectations at the start of your business dealings. If the client stops responding as you're working together, gently remind them about these expectations and the importance for both your schedules of adhering to the timeline.

#### **4. Unrealistic clients**

Clients with high expectations often have big ideas for their business's direction, future projects or other visionary efforts. However, these clients may sometimes ask you to perform services beyond what your business can provide. Establish clear parameters with these clients about your business's abilities. Describe to them your highest-quality services or products and discuss realistic expectations.

If you regularly confer with the client, create agendas for your meetings that the client can review and add topics to ahead of time. Planning your meeting agenda beforehand can help your client remain focused on the most pertinent subjects and ideas.

#### **5. Empathetic clients**

Empathetic clients relate to how others are feeling. They typically enjoy social interactions and may provide you with lots of enthusiasm and positive feedback. However, an empathetic client may find it challenging to offer criticism or speak up if they want an aspect of your services altered. They might also struggle with receiving constructive advice. Show your empathetic clients that you value their needs by listening closely to their ideas.

Take notes during conversations and implement their feedback or ideas into your services. Tell these clients that you are open to receiving feedback and having productive conversations about how to find solutions that work for both of you. If you need to offer empathetic clients feedback, do so in a way that considers their feelings. Make sure to also stress the positive aspects of your relationship with the client or the aspects of your project that have been going well with them.

#### **6. Clients concerned with costs**

Most clients understandably expect quality services or products that are worth the price they paid. However, you may sometimes work with clients highly concerned about exact costs. This can be a challenge if you work in an industry that provides cost estimates beforehand and actual costs after completing your services.

Decide before your work begins with this type of client on the project's scope. Discuss ahead of time the most likely possible fluctuations in the actual costs compared to the

estimated costs. Agree prior to providing your services on any additional features or extras.

## **7. Clients who monitor your work closely**

Some clients check in regularly or ask for project updates faster than your business's actual progress on your work for them. These clients may frequently question minor details about your work together or show skepticism about most aspects of the project. Establish boundaries with this type of client.

Create ahead of time a schedule of regular meetings or provide set hours for when you respond to emails and phone calls. Show them you have professional expertise in your field by providing data related to or examples of your past work. Be direct in your communications and honest about your organization's capabilities, achievements and procedures. Give these clients reassurance that your business can fulfill their needs and expectations.

## **8. Clients who request changes after delivery**

Your organization may sometimes work with clients who want their services or products altered after completion. They might request that you redo a particular component or an entire project. Before you make the client's requested changes, ensure that the client understands what that logistically means.

Assure the client that you want your product or services to meet their expectations, but be clear about how the alterations might create additional costs or change your deliverable timeline.

## **9. Indecisive clients**

Another type of client is one who has trouble deciding. These clients might ask that you make all the choices regarding services, upgrades or project approaches. Alternatively, indecisive clients may frequently give you varying answers or create delays related to important decisions. Assist these clients by providing them with recommendations on what you believe to be the best options for their needs.

For more secondary or minor decisions, consult with your coworkers rather than the client to help minimize the number of decisions your client needs to make. Write down and ask the client to review decisions as you agree upon them to ensure that you both understand how to proceed.

## **10. Efficient clients**

Highly efficient clients keep their communications brief and direct. They typically know exactly what they want and prefer not to be surprised by your deliverables or services. Communicate with your highly efficient clients in a clear and concise manner.

Prepare detailed summations of various options to help your client make informed decisions. Wherever possible, present this client with relevant data, facts or testimonials to provide positive evidence about your services.

## **11. Traditional clients**

Traditional clients want things to mostly stay the same. These clients may have been professionals for a long time and prefer services or products to be handled in a certain way. They might resist changes to their operations, even if those changes could provide long-term benefits.

When working with traditional clients, provide details about the reasons behind and benefits of your procedures, approaches or offerings. Sympathize with their concerns for more traditional methods while encouraging them to understand the value of modernized processes.

## **12. Clients who work overtime**

Some clients who work beyond traditional business hours may expect you to do the same. These clients might contact you during odd hours, nights or weekends. They might also request meetings or project deadlines outside of your business's operating hours. If you have clients who work overtime and request that you do too, establish clear hours or time frames before your work together begins.

Be firm about only responding to messages, scheduling meetings or providing deliverables during your company's operational hours. Ask your clients if their urgency relates to a specific need or project at their own company and work to create a timeline that satisfies both of you.

## **13. Trendy clients**

Trendy clients are often up-to-date on the latest business news, approaches or products. Their knowledge may help them make informed decisions related to your business's offerings. However, these clients might also request business trends that offer unclear or little benefit to their particular expectations.

Ensure that these clients understand the connection between their requested trends and their own business needs. If you're not sure how the trend would help their business, explain your reservations and offer them options you believe would provide their business with greater value.

## **14. Clients who work on committees**

Some clients typically make decisions by committees rather than themselves. These clients most often work at larger organizations or enterprises. While deciding with others can help your clients make better choices, this may sometimes lead to delays in your operations or production schedule.

If your client wants to consult with their committee on every option, ask if it is possible for you to deal with a single representative from their company for most or all of your communications. If that seems challenging, request that the major stakeholders involved in your company's project be present at all meetings or copied on all correspondence.

## **15. Clients with negative experiences**

Some clients may have challenging experiences with your business. These clients may sometimes leave negative feedback on your website or on external sites that review other businesses. Reach out to these clients personally to offer your sympathy.

Apologize for their poor experience and explain what you are doing to improve your services, products or operations in relation to their concerns. You might also consider giving them a special offer, such as a unique discount code or promotional offering.

## **16. Clients concerned about security**

Many clients today understandably worry about security risks, such as cyberattacks. However, this can create challenges for your business if the client hesitates to provide you with the necessary information. For example, your company might need access to your client's website, but the security-conscious client may not want to give you their passwords.

If your clients are worried about security threats, provide them with documentation or explanations of your business's security network and systems. Depending on your business's existing security measures, you may want to update your security measures, such as by strengthening passwords or encrypting routers.

