



Compilation of Notes for Regional Peer RoundTable Calls 11.16.2021

Attendees:

- Yvette Hernandez, Achieve Staffing
- Carey Carpineta, AlliedUP
- Faith Keller, Beyond Talent at StepUp Wilmington
- Mariel Corona, Cara Connects
- Venois Peebles, Community Staffing Solutions
- Kevin Vandebosch, Marcia Nozick and Doug Aason, EMBERS Staffing
- Elsa Lemoine, Galt Foundation
- Clarence Scott and Jim Fuller, GoodWork Staffing
- Suzanne Warsaw, Harmon Personnel
- Joan Nassef, The Kennedy Center
- Juanita Atitsogbuie, Kitchens for Good
- Paul Thompson, Purpose Workforce Solutions
- Tim Rettig, Staffanation
- Lee Humason, Uplift Northwest
- Mickey Wiles and Colleen Hobbs, Working Fields
- Hannah Pace, YUPRO
- Willie Davis, Right Time
- Jay Mattern, TerraFirma Marketing
- Mark Winter, WinSource
- Shavon Prophet, ICA Group

Topic: Quarterly Business Reviews (QBRs) aka Account Reviews, Customer Business Reviews

Guest presenter: Mike Wager, consultant with Visus Group and 30-year career in IT/professional services staffing

Account Review Objectives:

- **Mike:** Two types of business reviews, with your clients and internally with your team. In both cases, general purpose is to step back from the day-to-day and take a strategic, planful look at the business, both past and future, to understand where you're at and where to go from there – what's working well, what needs to be done better, what are the lessons learned, incorporating things that have worked, and getting agreement about how to move forward. With clients, it's an opportunity to collaborate with them, learn more about their business and deepen the relationship.

- **Jay:** The “why” of doing these is important. At PeopleLink, we used the four Vs:
 - **Value** – demonstrating the value you provide to your client
 - **Vision** – anticipating the future, what’s coming down the road in the next 3 to 6 months?
 - **Vibe** – getting feedback from your client; “how are they doing, how are we doing?”
 - **Volume** – where are we not servicing this client? Where are we missing opportunities to do business with them?

In our firm, the COO drove the process. We didn’t do these with every client. It was based on the level of revenue, large accounts first and foremost, and accounts with significant opportunity to grow/gain more market share.

- **Mark:** I see business reviews as a report card of your account management process, having conversations with customers to make sure you’re keeping the promises you had set out and help develop your account management process.
- **Yvette:** QBRs are what helped me grow GoodSource in Orlando. Our largest account was the City of Orlando. Each department was a different client, but contracts had to be established by Procurement. I did QBRs with each department so we could present results to Procurement in our annual meeting with them. I think these reviews are vital.

Frequency of Business Reviews with Key Customers

- **Mark:** I scrapped the term QBR because no one consistently does 4 business reviews per year, even on their top 5 customers. We use the term Account Review or Customer Business Review. The way to determine the cadence is:
 - **How often does the customer want them?** It’s one of the things we set up as part of the account plan.
 - **What is volatility of the business?** If key people (buyers) are changing or there are a lot of highs and lows in business volume, we do them more often. If business is stable, once a year may be enough.
- **Mike:** Companies I was with did the *internal* account reviews religiously every quarter. On the client side, clients were definitely more engaged if it was their idea.

Sample Business Review Framework for Key Accounts – Mark Winter

Big Picture – What’s happening in *their* industry?

- Start with the customer’s business. The first 2 agenda items (Big Picture and Impacts) are all about them. That’s what they want to talk about, and it sets the tone for a conversation. I also want them to know I have some expertise in their space.
- Data sources: BLS, [ITR Economics](#), Dun & Bradstreet, Hoovers, other data platforms

Impacts [of your services] to *their* organization – Growth, productivity, culture, quality, preventing loss

- Why are they using staffing? Is it part of their strategy or do they have to use staffing? How does their use of staffing impact their business? Is it working?
- This requires pre-work: gather data from your contacts in the company, e.g., buyers, users, A/P staff – “how are we impacting your business?” Serving back their data creates more conversation – their metrics, not yours. When people see their data incorporated into your presentation, it feels like a mutual back and forth. They appreciate it! When you have negative feedback to share (and how you’re going to address the issue), it’s disarming.

Start and stop investments

- What would they like us to start doing and what should we stop doing?

Day to day operations

- Numbers, what your team is doing behind the scenes

Mutually agreed upon objectives

- The account reviews should include people from both teams. You might have the customer's executive team at the table. Sometimes you can't get all the people you want and sometimes it's not appropriate. You can reach out to those folks in advance and include quotes from them in your presentation. It's a way to include their voice, and it demonstrates you have roots in the organization and that you're listening and paying attention.

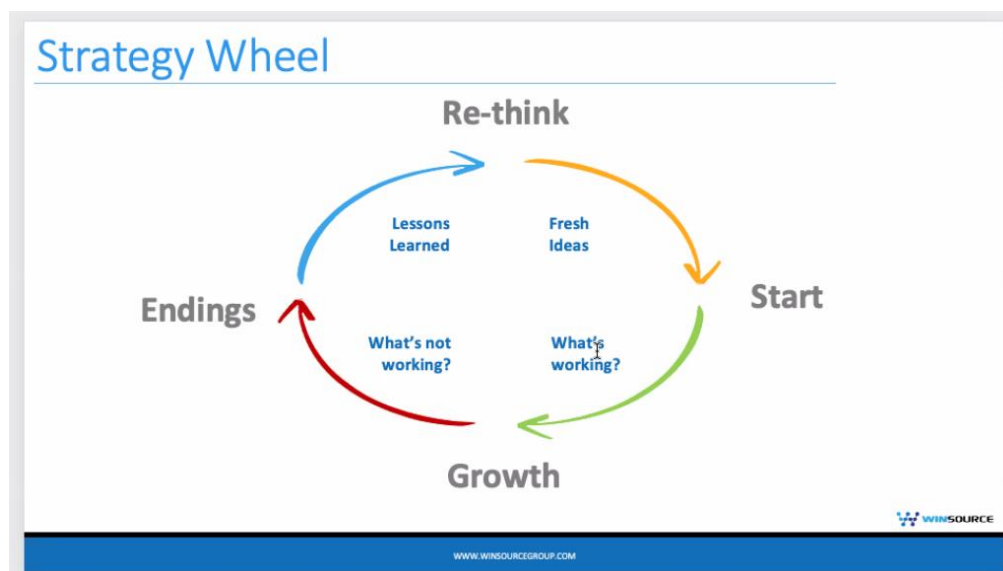
Next steps

Price increases

- Good time to bring up with customers where you're performing well
- **Joan:** I do find it useful to find out as much as I can ahead of account reviews and will bring up problems I know exist because it engenders trust, and you're being honest.
- **Clarence:** I did a meeting with an account last week and thought I would get called out when I shared that our turnover rate last quarter was 50%. Their response was "that's pretty good." I shared that we're usually in the 20-25% range and that led to them sharing the retention problems they're having internally and then a discussion about ways we can work together to improve coaching.
- **Mike:** It's amazing how much better it goes when you admit your challenges and talk about what you're doing to rectify them.

How to Get Started

- **Jay:** Start where you are, start small. You can simplify it even more than the four Vs to "past, present, future." Here's what's been accomplished so far, here's what we're doing now, how can we help you in the future?
- **Mark:** If you're doing Business Reviews for the first time, here's another set of questions to start the conversation:



- **Mike:** I also recommend starting with the most collaborative customer you're doing a reasonable amount of business with. It'll be more comfortable, and easier to make adjustments as you're going through it. And it'll make it easier with the next customer.
- **Jay:** To recap:
 - Make sure it's a dialogue! It can't be a one-sided presentation. Allow room for engagement. Ask, "what are your thoughts about this?"
 - You'll be presenting numbers but make sure they're relevant. Don't overdo the data.
 - It's extremely important the right people are involved.
 - Make sure there's some strategic discussion. That's the client's primary concern, what they're strategically trying to accomplish and how you're strategically supporting them.

Presentation Format

- **Mike:** I typically use a PowerPoint to guide the discussion.
- **Mark:** I use a combination of PowerPoint and print handouts, depending on the account. Probably start with the handout for lots of back and forth before we open the laptop.

Who Should be Involved in Account Reviews with Clients?

- **Mike:** It's different in each organization; often procurement-oriented but may involve decision makers in specific departments.
- **Jay:** With procurement only, we found it was always about (and only about) the numbers. You don't have the opportunity to talk to the folks you're providing services to; it's not an exchange of ideas. Otherwise, we always used the 3 X 3 rule – 3 levels of people on both sides, your point person in the client company, and 2 other execs (both higher level or 1 higher and 1 lower)
- **Mark:** I would ask the client, who do you think should be there? I also like the 3 X 3 model. The person you deal with the most day-to-day is your middle person. Then I try to go one or two levels up, perhaps that person's supervisor and the CFO.
- **Tom:** Many of my clients bring a senior recruiter to the review because fulfillment is so challenging right now. Folks love that someone in delivery is involved.
- **Mark:** Yes, clients often ask for operations staff. In light industrial staffing, it was common to bring our branch manager to represent the recruiting staff.
- **Mike:** Involving fulfillment staff increases your internal sense of accountability, too.

Sample Business Review Framework for Internal Teams – Mike Wager

Opening

- Industry Updates
Anything pertinent to the relationship or impactful to the service delivery
- Organization / Corporate Services Updates (Finance, Admin, Marketing, and others supporting process behind the scenes)
- Organization Financial Performance Review
If external review with client, could lead into a forecasting discussion for the upcoming quarter

Territory & National Account Reviews with individual account reps

- Financial Performance (actual vs. plan)
- Forecast

- **Key Accounts**
If *external review* with client, key pieces of the business where there might be more activity; if multi-verticals, could be looking at light industrial, IT, etc.
- **Adjustments to plan (s)**
If *external review* with client, how can we serve you better? How can either party adjust their behavior to facilitate the placement process? Are there any bottlenecks in the process?
- **Top 3 to 5 objectives for current quarter**
If *external review* with client, what are you trying to accomplish in the next quarter or so, and how can we support that?

Recruiting

- Performance vs. Plan in candidate delivery
- Updates on sourcing, recruiting, placing

Brainstorming Session – Key issues / Shared challenges to “war room” or whiteboard as a group

Additional Topics or Strategic Initiatives (on occasion to be addressed as the need dictates and may include a guest speaker)

- Lead Generation
- Ideal Client Profiles
- Leveraging social media
- Increasing the win rate
 - Resume Preparation
 - Candidate Interview Preparation
 - Client Interview Prep
- **Kevin:** At EMBERS, we do quarterly business reviews between senior leadership and each branch office, about 2 hours each. Our typical agenda is:
 - Positive customer service story to kick things off
 - Introduce new team members
 - Financial review, mainly hours billed and P&L
 - Discuss next quarter forecast
 - Review other topics as needed, e.g, training, health and safety
 - Q&A

Each office’s team does all the prep for the meetings. We use these as an opportunity for less experienced managers to present about the business and financials in a formal structure. They get more comfortable understanding what levers affect each line item of the P&L, and it increases their ownership of the outcomes.

Length of Account Reviews

- External with client: Typically a 2-3 hour session
- Internal with team: 2-3 hours to 1.5 days, depending on the number of people involved

Takeaways / Best Practices from today’s session

- **Yvette:** Doing QBRs has been so important to me in both for-profit and nonprofit settings. Be sure to make it about the customers, not about yourselves. We always left the key metrics and our performance to the end.

- **Carey:** It's a good reminder to suggest and set up this process with accounts at the beginning of the relationship.
- **Joan:** I like the idea of formalizing the process and using Power Point. Going forward I also will talk a bit more about their business.
- **Suzanne:** I appreciate the structure piece.
- **Jim:** I like the Strategy Wheel a lot.
- **Faith:** Bringing industry insight to tee up the conversation is a great idea.
- **Clarence:** Asking more questions about their business. I like the idea of doing research and talking with more folks, department heads and so on, before you come together.
- **Elsa:** Teaming up salespeople and fulfillment staff in client meetings so both hear things from the client at the same time. I also like the "lessons learned." It's a good way to bring up obstacles that have arisen and recognize how we solved them.
- **Kevin:** Our next quarterly review is coming up in January. It'll be very valuable getting all 4 branch managers involved in one conversation, not siloed in their own division.
- **Juanita:** We already meet quarterly with our employer partners to review the competencies and skillsets of our apprentices. My key takeaway is including the business review piece in our meetings with employer partners, especially as we shift how we're working with them.
- **Doug:** The critical point is bringing the relevant stakeholders together and getting everyone on the same page, integrating our operations and salespeople to understand the bigger goals of the organization and how together we're going to get there, get the buy-in from the whole team.

Next Roundtable: Tuesday, December 14, 2021 @ 2pm CST, 1 call for all 3 groups!