**Strategic Partners Service Model**

It’s important you manage the relationships you have with your Strategic Partners in the same proactive, professional way you manage your best clients. They are significant and can have a profound effect on the type of clients you attract and your future growth.

**Service Model for Strategic Partners**

Below is a sample of how you may want to service your Strategic Partners. It includes a variety of meaningful touches throughout the year, resulting in a touch point approximately once every two months.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Lunch Meeting** | **Article of Interest** | **Annual****Event** | **Relationship Call** | **Thanksgiving****Card** | **Moment of Truth** | **TOTAL Annual Contacts** |
| Annual | Annual  | Annual  | Annual | Annual  | Annual  | **6**  |
| Jan | April | May | August | Oct/Nov | As Appropriate |  |
| Q1 | Q2 | Q2 | Q3 | Q4 | Varies |  |

We’ve provided a sample time line to illustrate how it could be spaced out throughout the year.

You will notice that the **Moments of Truth** are the only service item which cannot be ‘pre-scheduled’ and instead requires you to pay close attention to what is going on in their business and life. A great way to identify opportunities related to Moments of Truth is to connect with them on LinkedIn. This professional network will send you automatic announcements regarding their work accomplishments, articles they’ve published, work anniversaries, and more. Resist the temptation to simply respond directly on LinkedIn with an email note of congratulations. Instead, especially for the significant accomplishments, deliver a personal card or note of acknowledgement the old-fashioned way which has a more meaningful impact and a longer shelf-life. When was the last time you displayed an email of ‘Congratulations’?

**Business-Related Moments to Acknowledge** (these supplement the personal MOT)

* Business Expansion and/or Opening a New Location
* New Business Partner and/or Adding Family to the Business
* Industry Acknowledgements or Recognition
* Positive PR About the Business or the Contributions to the Community
* Meeting Growth Targets & Goals
* Milestone Anniversaries (10 years in business, 20 years in business, etc.)
* When Adversity or Challenges Occur

**Quality Versus Quantity**

Make sure you have truly identified someone as a ‘Strategic Partner’ before you commit to this servicing of the relationship. It is not recommended you do this for those who simply qualify as a ‘potential center of influence.’

This group is purposely kept small and exclusive to create results. As always, to ensure flawless implementation, have this organized and automated on your Maximizer.

Identify the relationship management (service) activities you plan to proactively use to manage these important relationships? Note: They may be different for Internal and External Strategic Partners.

**INTERNAL STRATEGIC PARTNERS**

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**EXTERNAL STRATEGIC PARTNERS**

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