

THE ACCOUNT MANAGERS GUIDE TO CLIENT RESEARCH

MORE THAN 125 POWER TIPS

**WHAT MAKES YOUR
CLIENT TICK?**

**SOCIAL MEDIA SEARCH SECRETS
AUTOMATING YOUR RESEARCH
WHAT TO LOOK FOR & WHERE TO FIND IT**



“If we knew what it was we were doing, it would not be called research, would it?”

Albert Einstein



Warwick Brown
Founder

Client research should be at the centre of everything an Account Manager does.

The more you know about your client, the better you'll be able to understand their challenges and present solutions that solve their problems.

You'll form stronger relationships. You'll be more persuasive. You'll have greater authority and credibility. All because your conversations and advice are well informed and on subjects close to your clients' heart.

But client research takes time, something most of us have in short supply.

What follows are 125 tips, tools and resources to crush your client research, slash the time it takes, and use technology to put it on autopilot.

A handwritten signature in black ink that reads "Warwick" in a cursive style, with a horizontal line underneath.

LinkedIn

LinkedIn is the easiest place to start your client research. You're able to build and engage your professional network, access knowledge, insights and opportunities.

- Visit the [email preferences](#) in LinkedIn to send updates from your network to your inbox.
- Follow your client's company page on LinkedIn.
- Follow your main point of contact and any other important decision makers and influencers.
- Review their profile on LinkedIn. Look for common connections, experience or background.
- What groups and associations do they belong to – can you join them?
- Are they sharing content regularly? Look for patterns or themes in the posts for clues about what is important to them?
- Have they written any articles? What were they about and how might you draw conclusions that might be relevant to your own business and solution?
- Look for patterns or themes in the content that will give you some clues into what is important to them?
- Search for your clients' name, their industry, key people and other relevant content. Try [using Boolean search](#) to combine keywords with operators like AND, NOT, OR to get better results. Did you find anything interesting?
- Look at job vacancies. What kind of roles (if any) have they recruited for this year? What might that tell you about them?
- Create a [job alert](#) to monitor new roles your client is recruiting for.
- Regularly summarise your observations on your clients' business and the people you want to grow stronger relationships with. Things will change over time. Add these notes to your CRM.



YouTube

Did you know YouTube is the second largest search engine in the world (behind Google)? Almost 5 billion videos are watched every day. You'll find a treasure-trove of information on your client and their industry.

- Subscribe to your clients' YouTube channel and make sure to set notifications to on, so you'll be alerted when they upload a new video.
- Use search to find relevant results according to keyword queries.
- Take note of additional terms auto-suggest has made. For example, when you search *bt group* you'll get additional recommendations for *bt group values*, *bt group results* and *bt group news*.
- Search the names of any key people in your client's organisation. Try adding a qualifier like "interview" or "presentation" or "speech" – that often turns up results.
- Watch the videos that interest you, especially the ones that explain their business.
- Read the video descriptions. These often have useful information and links to other relevant resources.
- Create a [private playlist](#) in the name of your client and add videos to it as you find them.



Twitter

Your client is on Twitter, so you should be too. It's the best place to learn breaking news and for social listening. What are people saying about your client? You'll find out on Twitter.

- Use [Twitter Lists](#) to organise users into a group. Create a private list (which means you're the only one who can see it) called "My Clients" and add all your clients Twitter accounts to it.
- Use [advanced search](#) to tailor search results to specific date ranges, people and phrases and more.
- [Save any searches](#) that prove especially relevant. It'll save you a lot of time in the long run and make it faster to find useful content about your client.
- Monitor your Twitter lists and timelines with [TweetDeck](#). It includes a host of useful features to get the most out of Twitter, including advanced search, tweet collections and more. And it's free.
- Subscribe to my [Business Trends Twitter List](#) where I follow leading journals, newspapers and consulting firms for research and commentary on the topics that matter most to business.



Google

Sure, we know Google is the only search engine that matters. But how you search will make a big difference to the results. Here's some tricks for a more precise search.

- To search for the exact phrase, put it in quotes e.g. "controversial business trends".
- Use the minus sign to exclude certain words. For example, **research - market** will return all results with the word research but remove any results that have the word market.
- The *allintext:* operator will find pages where all the search terms appear in the text. For example, **allintext: bt ceo presentation**
- Instead of always searching all, use the tabs at the top of search to narrow your category (e.g. images, news, videos, books, maps etc).
- Search for multiple words at once e.g. "job interview tips" OR "job interview advice".
- Find a specific file by adding **filetype:pdf** or **filetype:pptx** - I've found this very useful to find presentations and reports.
- Try [Google Advanced Search](#) to narrow down your search results even further.



Create Alerts

There is a wealth of information online about your client. Set up an alert service that will monitor social networks, news sites and blogs and send you a notification when it discovers an information.

- [Google alerts](#)
Set up your search query, choose your sources and how often you want to be notified and google will monitor the web for any interesting activity. The configuration options are limited, and the results aren't always relevant.
- [Talkwalker](#)
Social monitoring tool that allows you to track your client or any other topic and receive notifications when it discovers a mention. More robust than Google alerts because it includes Twitter, has greater filtering options, and Boolean operators can be used to narrow down the results and only see the most relevant ones.
- [Warble](#)
Get once-a-day email alerts for Twitter. You can track keywords, phrases, #hashtags, @mentions and more.
- [Owler](#)
Follow companies you want to research and Owler will send you the latest industry news and alerts. They have two email types: Instant Insights for big announcements like acquisitions and leadership changes and Daily snapshot of curated news stories and blog posts on followed companies.



RSS Readers

Catch up on all the latest news from your client's website and blogs by using RSS Readers to subscribe to their feeds. The readers will automatically pull recently updated posts into a magazine style layout.

- ❑ [Feedly](#)
Offers 4 different layouts, keyword alerts and boards to save the most important articles you read around your clients and their industries. Download the [Chrome](#) or [Firefox](#) extensions too.
- ❑ [Inoreader](#)
Advanced customisation with 9 different layouts and themes and the ability to monitor keywords (like your client's name) in Google News and Twitter. Download the [Chrome](#) or [Firefox](#) extensions too.
- ❑ [Pocket](#)
A simple and invaluable tool for saving entire web pages to read later on your iPhone, iPad, Android, computer. Download the browser extension to make the most of its features.



News Services

There are several apps that allow you to consolidate your news feeds and subscribe to content based on keywords, topic and interests. These are helpful to stay informed on current news and trends that impact your client and their industry.

- [Google News](#)

Google pulls news sources from all across the world so your favourite sites and publications will be represented. Search for your client and then follow the topic to get updated every time they make the news.



Emerging Trends

Here's a list of stellar sites that share thought-provoking content to help you learn about emerging business trends that may be relevant to your client and their industry. Read these to stay informed and grow your understanding of the environment your client operates in. Share with your client any articles you think they might find interesting.

- [Harvard Business Review](#)
Find new ideas and classic advice on strategy, innovation and leadership, for global leaders from the world's best 17Tbusiness17T and management experts.
- [The Economist Intelligence Unit](#)
Special reports that provide practical business information on macroeconomic events, country affairs and issues affecting industries. Each report contains a broad overview followed by a detailed analysis of underlying issues, along with forecasts to help prepare for future trends.
- National Newspapers
The Guardian, The Washington Post, New York Times etc. Sign up to receive daily emails with news headlines to your inbox. A simple way to stay informed on the political, economic, social and technology landscape in your country.
- [Deloitte Insights](#)
In-depth reports, articles, videos, research, thought leadership and insights that matter to help organisations reach their potential. Sign up to their newsletter.
- [BCG Global](#)
They cover 20 industries in detail with thought leadership and revealing research on topics that impact these sectors. They also have a newsletter.



- ❑ [IBM Institute for Business Value](#)
Discover emerging trends, business innovations and success patterns with thought leadership reports that offer fact-based, strategic insights on critical public and private sector issues.
- ❑ [Accenture Strategy](#)
Deep business insights on how technology will impact industry and business models.
- ❑ [KPMG Insights](#)
Research that focuses on the complex business challenges faced by companies around the world. They have an excellent filtering tool to help you find insights by service, industry, geography and more.
- ❑ [Bain Insights](#)
Data, expert analysis and thought leadership on macro trends, digital transformation, customer advocacy, innovation and other topics important to business.
- ❑ [Strategy&](#)
Thought leadership and management magazine by PWC that discusses strategy and execution and how it can transform business.
- ❑ [Raconteur](#)
Great content geared towards business leaders on topics like innovation, finance, sustainability, risk management, retail, technology and more. Excellent special reports and infographics.
- ❑ [PWC](#)
Latest insights and research on global business trends. They publish a range of annual surveys and forecasts that will help you understand the opportunities, challenges and trends that may impact your client. Create an account so you can follow topics and save articles.
- ❑ [Kearney Insights](#)
Articles and research reports for various industries that examine the issues and emerging trends.
- ❑ [Gartner Insights](#)
Insights, advice and tools for business transformation. Services include, Finance, HR, IT, Legal, Procurement, Sales.
- ❑ [Oliver Wyman Insights](#)
Research, thought leadership and news on issues that are reshaping business, economies and societies. Good industry coverage and very topical content.



Statistics

Hard data always helps make your arguments stronger. When you make recommendations to your client, backing up your advice with some relevant statistics can really help. Look for industry and demographic trends relevant to your client. Here's where you can find them.

- ❑ [Statista](#)
They have data for more than 60,000 topics from 18,000 sources. They also have reports, market studies, forecasts, infographics and lots more. The free account is limited, but gives you access to basic data.
- ❑ [Gallup Reports](#)
A range of reports that span business, politics, education, global and social issues
- ❑ [Knoema](#)
Public data library features more than 2.4b time series from thousands of sources. Great for country, demographic and services data among others.
- ❑ [Pew Research Center](#)
Data on issues, attitudes and trends shaping the world. Research areas include journalism and media, internet, science, technology, global attitudes and trends, social and demographic trends and more.
- ❑ [Infographic Journal](#)
An archive showcasing the best infographics across a range of categories. Just be sure that any that quote statistics name their source.



Key Performance Indicators

When you create your account plans you want to identify objectives that are meaningful to your client and will make an impact. You'll get a lot more engagement if you set targets and measure results using KPI's that are relevant to your client. Here's some useful KPI Libraries to help you decide.

- ❑ [Bernard Marr Key Performance Indicator Library](#)
A great starting point to identify the right KPI's, grouped by business function and with a brief definition and how it's calculated.
- ❑ [KPI Library](#)
KPI Library is a crowd-sourced repository of Key Performance Indicator and is the world's largest library for KPI information with a database of 6500+ performance indicators. It's now closed but you can download an archive of all KPIs in Excel.



CRM

If you have a customer relationship management (CRM) database – and you should – then dig around and see what information is in there. Here’s some things to look for:

- Read your client’s contract. Any unusual terms, conditions or schedules? Also make a note of when it’s up for renewal
- Review the account history – meeting agendas and minutes, call logs, support tickets, complaints, emails, business reviews, reports and notes – they should give you good insights into what’s working and what isn’t.
- Was there a formal RFP? Read the original document and your submission. You’ll learn a lot about your client, their objectives and why they chose you. Does it still hold true today? A lot can change over time.
- What products and services have they bought? What impact have they had on your client’s business?
- What products and services don’t they have? Do any stand out as having potential? Are there opportunities to open a conversation with your client about them?
- Has their spend gone up or down quarter-on-quarter or year-on-year? Why?
- What marketing campaigns have they opted into or out of?



Client Websites

Your clients' website is an often-overlooked resource to learn about their business and the environment they operate in.

Make note of anything that interests you. What does it tell you about your client? In particular, look for synergies – are any of their values aligned with your organisations? Are you facing similar challenges or successes?

- Read the About Us page.
- Read their vision statement.
- Read their mission statement.
- Subscribe to their RSS feed (see [RSS Readers](#)).
- Sign up to any newsletters.
- Download any whitepapers and case studies.
- Review the investor relations section – you'll often find webcasts and presentations from earnings calls, new projects and important news.
- Read up on the leadership team.
- Watch any corporate videos they may have available.



Competitors

You can learn a lot about your clients' industry by doing a little research on their competitors. Consider the similarities and the differences.

- Identify three of your client's competitors.
- Visit their website and look specifically for industry related news, case studies or reports. Annual reports will also have a lot of macro-economic trends and commentary.
- What's their point of view and value proposition and how does it differ from your clients?
- Makes notes on what you learned. Do you think these observations are relevant to your client?
- How does their offer compare to your clients? What do they do better?
- Call your point of contact and say you've been doing some research on their industry and came across some interesting trends you'd like to share with them and invite them to discuss their point of view with you.



Ask Your Clients

The people at your client's organisation are their historians. They can tell you things you won't find anywhere else, so go straight to the source if you want information fast. Here are a few ideas:

- Satisfaction call.** Review your NPS or CSAT Surveys, review your support tickets or just go through some old emails. Identify someone you'd like to call and ask them if they were happy with the resolution? Is there anything more they'd care to share on their experience? What do they think of your solution?
- Discovery call.** Reach out to your main point of contact and say you'd like to better understand their business, their challenges and their priorities for the year and arrange a time to have the conversation.
- Customer survey.** You may have standard surveys being sent after a service interaction, but they can be generic. Consider asking your client to partner with you and send a joint customised survey to get answers to questions you both want to know. You each ask a handful of related questions, you write the survey, your client sends it (more people will respond that way) and you'll both learn something new. Design your survey in [Typeform](#) or [Survey Monkey](#). They're both great.
- Drop in sessions.** Next time plan to meet with your client why not extend the meeting to include a drop-in session and invite users to stop by for 10 minutes to chat about their experience with you. This can work really well, but you have to promote it and send reminders on the day to minimise no-shows. And bring donuts.
- Org chart.** Ask your point of contact for a copy of their org chart. It'll help you understand their structure and who the key players are.



The more questions you ask, the more you will learn. The more you learn, the more opportunity you have to help your client, anticipate risks and earn your place as trusted advisor and strategic partner.

Here's my list of the 45 best questions to ask your client grouped by topic.

Industry

1. What does your client do?
2. What challenges face their industry? Political, economic, social, technological, legal (PEST)?
3. Who are their competitors?
4. What makes them unique in the market? Strengths, weaknesses, opportunities, threats (SWOT)
5. Are there any trade shows and other events they attend?

Organisation

6. What is their [company culture](#)?
7. What is the decision-making process?
8. Who are the most challenging people in their organisation and what impact do they have?
9. What are the challenges in your clients' business right now?
10. Who are all the decision makers and influencers?
11. Who else should you be talking to?
12. Will they introduce you to their teams to learn about how they manage their clients?
13. What is the vision for their company?
14. Who are on the board?
15. Are they a private or public company? How and when are earnings reported?



Your Point of Contact (POC)

- 36. What problems do they need to be solved?
- 37. What else does your POC do? Do they have responsibilities beyond managing your category?
- 38. What are the big projects your POC is working on?
- 39. What do they love about their job?
- 40. What do they wish they had more time to do?
- 41. What's keeping them up at night?
- 42. Has your POC's job changed?
- 43. What do they care about?
- 44. What type of communication works best for them? Email, phone, face to face? Do they have any ideas on how to improve it?

Targets

- 25. What results is your POC expected to deliver this year?
- 26. What evidence do they need and how do they want to track the performance of your category?
- 27. What does success look like?

Supplier Management

- 28. What kind of administration do they have to do? (e.g. reporting)
- 29. On a scale of 1 to 10, rate how important is this category?
- 30. What are the consequences if they do nothing in your category?
- 31. Have they got more time or less to focus on your category?
- 32. What do they think makes a successful client-supplier relationship?
- 33. How do they manage their clients?
- 34. What is their process for issue resolution and management for your category?
- 35. Has their budget changed this year and how did they forecast it?



□ **Your Solution**

45. What do they think about your products and services?
46. Why did you win their business?
47. What needs did you address and are you still meeting them?
48. Are those needs the same or have they changed?
49. What would they like training on?
50. What issues come up regularly?
51. Is there anything they wished you offered, but don't?
52. What do they think you could improve upon?
53. What is the single most important benefit they get from you, above all else?
54. If they need something from your business, do they know where to go?



How to Keep Notes

You'll need to make notes of all the interesting things you find. I like to start with pen and paper – it's portable, never runs out of battery and by writing things down it helps you remember facts more easily.

Transfer your notes to digital as soon as you can though. It's better for archiving, searching and sharing information. Here are my favourite tools.

- ❑ [Trello](#)
Project management tool that's simple in design but loaded with features. Create a board, then add lanes to organise your information into categories and add cards to add your notes.
- ❑ [MindMeister](#)
The only mind-mapping tool that's worth considering. Simply add all your notes and then group them into themes. An easy and visual way to view your notes.
- ❑ [Evernote](#)
Very popular note-taking app with lots of features including screen-clipping, saving web pages, Easy to create and organise your notes and collaborate with teams.
- ❑ [OneNote](#)
A flexible and powerful project note-taking tool. Notebooks are divided into sections and pages with easy navigation and customisation. Record audio notes, insert videos, clip and save full web pages, sections or images. The search is my favourite feature. It recognises handwriting and text on images so you can find anything in seconds.

