The Lessons Learned Meeting is a structured interview with your clients and key decision-makers in the organization that takes place in the middle of the engagement as well as at the end. It is a time to check in with your clients and learn from them what is working and what can be improved. It's also a time to share with them what they can do better or differently to help you to do your job better. Typically, these sessions turn into a mutual admiration and acknowledgement fest, which is a fabulous time to a.) ask for testimonials, b.) ask for referrals, and c.) ask what other challenges, issues, projects, or needs are coming up for your client so you can shift the lessons learned conversation into a sales conversation. Whenever you are interacting with your clients and they express gratitude or appreciation for your skill and contribution, ask for referrals. (There are three keys to getting referrals that we'll cover in the next chapter.) Of course, once the referral becomes business, you close the loop with a handwritten note or small gift to the referral source.

Lessons Learned Meetings

When holding these informative sessions, do not take things personally, should something less than positive come up. Consider it an opportunity for genuine apology and rekindling of the relationship. You can use these meetings for damage control before things get ugly. Do not be defensive. Listen and accept the feedback as fact. It is the client's reality, and they need your empathy, not your reasons why they are incorrect. Do not invalidate their experience, but gather all the information you can for your own growth and development. Handle the confrontation with grace and you will turn around a potential upset into a fruitful relationship. Even if you do not continue to do business with the client, you still would like them to be a referral stream for you.

The sample below shows typical questions and topics for discussion in Lessons Learned Meetings.

Sample: Lessons Learned Discussion Points

What went wrong?
What went right?
Success stories
New cases, new issues, new products, new programs, new business coming down the pike?
Get permission to use work product
Changes anticipated in the future?
How client can use your services more effectively in the future
What client did well
Referral (internal and external)
Letter of testimonial
Testimonial quotes

Status of your business agreement/working relationship
Expanding business/new business
Depth in organization

What have we done that's been of value to you?
How can we better serve you in the future?
What are your expectations of us in terms of communication, work product, timing?
What benefits did you see in the consulting aspects of what we did?
How did our process work for you?
How did you find your overall communication with our org. to be?
Were you satisfied with the team that served you?
Was there anyone on the team you were not satisfied with?
Were there other issues that your team shared with you about us?
How can we help your firm expand its successes in the future?
Is there anyone else that you feel can benefit from the services we provide?
So, what's next?
What's next for you?
Will there be other cases/ issues/situations related to this one? Will you be working on them? Will we?
Who else should we be talking to?
Are you familiar with our X services?
Can we videotape you talking about our services for use with other prospects?
Could you write a letter for us to use in our marketing materials?
Can I quote you?
Will you write a letter of reference?
Was your client satisfied (in the case of a different end user or internal client).

The Lessons Learned Meeting is also a tool for you to initiate a new sales conversation. One of the keys to building business while billing time is to strategize how you can manage both current and past relationships and bring those individuals or companies into your sales process. You've heard the common sales fact that in order to really keep in touch and keep yourself top of mind you need to be in contact (called a touch) with every client 7 times per year. If you think about 7 touches per client per year, that means you will need to be calling everybody approximately every two months. When you are fully billable, you do not have time to do this, so you will need to brainstorm ways to "touch" clients multiple times per year when you are too busy to call. You can fax articles, e-mail relevant information, invite them to join you at events or social gatherings, keep a mental list of who you know in each city you happen to travel to and reach out when you're in town. With the increase in popularity of Blackberry technology, it is easy to send a quick hello note whenever you are thinking of someone on your list. You can now add lessons learned meetings to your repertoire for rekindling or reviving client relationships. It is a tool that gives you access to adding some old, past relationships to your target list because now you have a tool for revisiting contacts with whom you may have lost touch.

Of course, keep in mind that the primary purpose of the Lessons Learned Meeting is to ascertain whether or not you are delighting your clients and exceeding their expectations. The sales aspect of the meeting is secondary, and you want to keep clear for yourself that a new sale is your agenda, not the client's. Keep the client's agenda your primary focus, while listening in the background for the opportunities to gather information that would serve your agenda.