

## KEY RELATIONSHIPS INVENTORY

### HOW TO USE THE KEY RELATIONSHIPS INVENTORY

The categories below represent the types of relationships you want to build in your current clients and evaluate in your prospective ones. It's also a snapshot of your broader relationships outside of your customer base. As you read the following statements in each category, how would you rate yourself?

On this scale, 1 means the key relationship factor is extremely low right now, and 5 means the key relationship factor is extremely high. If you're evaluating a prospect and don't have enough information, use this tool to help you evaluate their potential, or identify your priorities and goals once they've become a client.

CATEGORY	STATEMENT	RATING (1-5)
<b>Referrals:</b> Strategic introductions and opportunity creation within my networks.	My client actively makes referral introductions for me inside of his/her organization.	
	My client actively makes referral introductions for me outside of his/her organization.	
	I have an identified and active peer referral network; we specifically make introductions and create opportunities for one another.	
	I have an effective process for requesting referrals from clients.	
<b>Testimonials:</b> Current and results-oriented documentation of the value I bring to my clients.	I have a collection of testimonials or use cases I can easily access and share with prospective clients. Where appropriate, they're viewable in my professional/social profiles.	
	My testimonials or use cases are results-oriented and current.	
	I can easily think of three clients who would enthusiastically take a phone call from my prospect; they would talk highly about the value of my work and the relationship.	
	I have an effective process for requesting testimonials from clients.	

(continued)

# KEY RELATIONSHIPS INVENTORY *(continued)*

CATEGORY	STATEMENT	RATING (1-5)
<b>Centers of Influence:</b> Individuals or organizations that open doors, provide insights, and create environments to build strategic relationships.	I have access to the centers of influence relevant to this prospect or client.	
	I am on a high-profile committee or I'm an active contributor to a high-profile organization – one that routinely involves centers of influence.	
	I regularly get requests from others for my insights, ideas, and connections related to my area of expertise.	
	I routinely make connections for others in my network; I connect them to people, resources, and ideas that are relevant to them.	
<b>Buying Roles:</b> Within a specific selling situation, these are the individuals involved in influencing the decision-making process.	I have a current map of the buying roles in my prospect or client selling situation. I know the power structure and where the influence lies.	
	I am actively cultivating relationships at all levels of the buying structure.	
	I have at least two advocates within the prospect or client who provide me with insights to the buying structure.	
	I know who my final decision maker is, and I have access to that person (even if the decision-making process involves a committee).	
<b>Strategic Alliances:</b> Partnerships that create complimentary opportunities; they're often revenue-generating and provide value I wouldn't otherwise be able to provide.	I understand the challenges and aspirations within my prospect or client, beyond just what my product or service can solve for them.	
	I have and actively leverage alliances (formal or informal) with providers that are complimentary to what my company provides.	
	These strategic alliances are financially beneficial; they generate revenue, profit, and commissions for all partners.	
	These strategic alliances help me to be more valuable to my clients and give me a competitive advantage.	

*(continued)*

## KEY RELATIONSHIPS INVENTORY *(continued)*

### USING 100 POINTS, THIS SCALE WILL HELP YOU INTERPRET THE DATA.

**0-40 POINTS:** Your key relationship factors are low; this is likely negatively impacting your effectiveness as a modern seller. While your scoring may be prospect or client specific, you'll want to take a bigger picture view of your overall approach to key relationships. In any categories where you scored yourself a 1 or 2, select one of those as your starting point. When you make improvements in one area, it will begin to positively affect other areas.

**41-75 POINTS:** You're solidly within the mid-tier. Look for categories where you're currently strong and continue to amplify those. Add to the mix by choosing a category that's out of your comfort zone and focus your efforts there.

**76-100 POINTS:** Your approach to key relationships are the definition of modern selling. Continue to amplify your areas of strength. To keep yourself on track, focus on any questions where you scored yourself a 3 or lower.