Connecting Virtually with your Customer

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BORD BIA
IRISH FOOD BOARD

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Introduction

This guidebook has been created to support Irish food, drink and horticulture companies in their preparation and delivery of successful virtual meetings and sales pitches. Online or virtual meetings are now the norm. With this, there are certain expectations which need to be met, when it comes to how the meeting will be managed and how it will be run.

Companies can stand out from competitors by delivering their message in a compelling way that connects with the audience and by following-up afterwards in a professional and timely manner. Online meetings are here to stay, so taking time now to plan your virtual meetings will help you to achieve your business goals.

Whether your meeting is a business as usual update with a customer or a first-time introduction to a potential buyer, there are three key stages to consider for successful customer connections:



We recommend that you view the supporting videos and for any questions or feedback, please get in touch with us at: clientcapability@bordbia.ie

Stage 1: Preparation

Customer Understanding

In advance of any customer meeting, you will add value to your conversation by taking whatever time you have available to *understand your customer* and what is happening currently in their business, their market and even personally. At a time when many buyers and customer teams are distracted – working amidst a lot of disruption, under pressure due to strong sales or collapsed sales and generally surrounded by a lot of noise – it is critical to walk in their shoes and plan your contact to improve their situation, rather than add to the complexity.



What you need to know about your customer

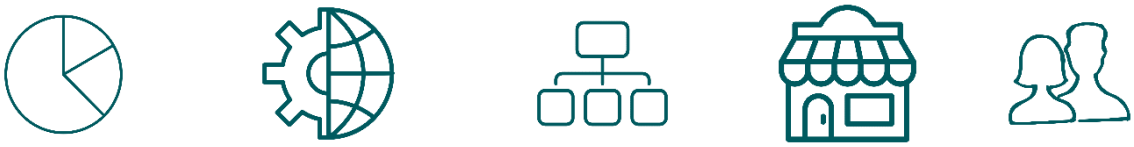
There are five key knowledge areas which give you a great foundation in your customer knowledge.

1. **Your customer's strategy** – This drives their entire business from top to bottom. Customers will bring their strategy to life through either their identity and/or value positioning. These can be easily spotted through the physical store; the virtual, website and key communications; and their customer service experience.
2. **Who your customers' customer is** – Whether it's a shopper or a business, you should consider your customer's customer in everything you do. Gain a deep understanding of who they are by observing them in store or speaking to them in depth. Understanding them will allow you to turn insights into action.
3. **Know how your buyer operates** – Understanding this and their key performance indicators will set you on the path to success. Remember that a buyer's behaviours and attitudes are driven by what they need to deliver and, ultimately, on how they're measured.
4. **Understanding the way your customer works** – This will allow you to customise your plans to better meet their needs, get proposals agreed and implemented and ensure that you do not miss critical deadlines for approval. Take the time to understand how your customer works from key strategies through to their Financial & Admin processes.
5. **Knowing your customer's supply chain and operations** – This will enable you to play an active role in ensuring the plans you have agreed with your buyer make it all the way to the shelf or depot.

Understanding where your target customer is on their sales decision journey will also provide valuable context for your conversations with them. If they are at the early, exploratory stages, focus your information on helping them to frame the problem e.g. by sharing headline market or consumer insight.

If they are deeper into the decision cycle, the target will be looking for information or neutral opinions e.g. category performance, trends, opportunities. When customers are toward the end of the sales-decision cycle, they should be supported by more granular information and data, comparisons of your product versus competition and a more overt sales pitch is what is required.

Where to find information about your customer?



Annual reports

Service providers & the web

Your buyer and other contacts

Stores and manufacturing sites

Your network

If you only have short notice of an upcoming customer meeting, you should still make time to refresh your understanding of them, their business and any current challenges or opportunities by:

- Online search – LinkedIn posts, media reports and features, performance updates
- Visit their website or their store/foodservice outlet/business
- Prepare key questions in advance – ask them in advance or during the meeting to help you understand their need

By having a top line level of information about your target customer, you will be better positioned to make a stronger, faster connection with them in the virtual world, leading to the creation of credibility and trust.

Developing your presentation or pitch

Depending on your customer meeting objective, you may need to prepare a formal business update, share a proposed marketing plan, pitch for a first time listing or a range extension. In all cases, the starting point for the content is your understanding of the customer need/opportunity and your business or product's role as an answer to that need. To do that effectively, it is important to have clarity on your USP (Unique Selling Proposition) and CVP (Customer Value Proposition) and to bring these to life in an engaging way for customers during the meeting.

Developing Unique Selling Point (USP) and Customer Value Proposition (CVP)

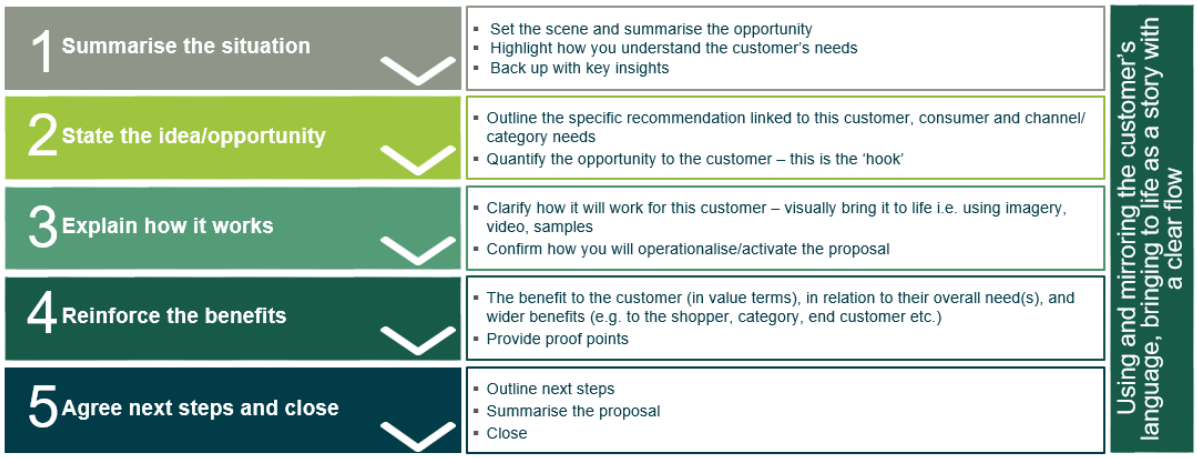
The USP is your product's most distinctive characteristic or feature; it's what makes your product **better than the competition.** This is what you focus in on when selling your product to elevate you above the rest of the marketplace.

The CVP articulates the benefit to the customer when they buy from you – it is the key reason why someone **should purchase your product over the competition**.

There are three key steps to developing a strong CVP for your business:

1. **Identify the customer and consumer needs** – this is a simple expression of the problem that your product will solve and the challenge that needs to be overcome. This is based on consumer trends in, shopping, consumption and their general lifestyle. It will also be shaped by your customer's strategy and how they do business.
2. **Define the benefits** – what exactly does your product offer? How does this solve the consumer and/or customer challenge that needs to be overcome? How will it improve the consumer's life or the customer's sales?
3. **Communicate the reasons to believe** – how do you credibly support this offer? How do you clearly and effectively demonstrate the objective value to consumers and customers and back it up with support?

In virtual meetings, engaging with customers using questions, storytelling and insightful content is critical to connect and to create standout. By using the outline below, you can construct your customer conversation to ensure that you are speaking to customers in their language and powerfully demonstrating the value and benefit of your proposal to them.



Stage 2: Delivery

Virtual meetings are now a common practice and a necessary part of working with a current or potential customer. It is important to demonstrate absolute confidence with both your message and the way in which it is going to be delivered. Any barrier to that will get in the way of a successful presentation.



This section is split into:

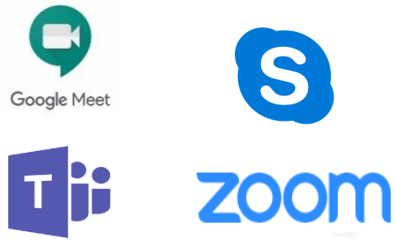
- **Setup**: how to prepare delivery of your message to your meeting attendees
- **Delivery:** how you will manage the interaction, in meeting, with your audience
- **Follow-up**: the steps that you will take after this interaction to ensure successful outcomes for your business.

Setup – Meeting Platforms to Use

Once you have a meeting confirmation, ask your customer if they have a preferred platform to use and aim to use this platform to avoid any issues with connections.

Otherwise, use what you are most confident and comfortable with. This will enable a clear conversation, minimising disruption, avoiding downloads and complicated logins. It is so important to demonstrate capability, expertise and professionalism with the technology now at our disposal. The four most common platforms to use are;

- Microsoft Teams
- Skype
- Zoom
- Google Meet



Use the right tool for the right event. You may want to incorporate sharing, enable reaction or on-demand actions for viewing later and each of these have different functionality which can aid your engagement. The most important thing to do is practice how to use the software you are using, including all the elements needed for interaction. Consider practicing all the key ones below:

- Screen Share
- Background image setup
- Sound delivery and microphone muting
- Chat functionality
- Guest meeting entry
- Recording button location and settings
- Your name and details presented on screen
- Meeting titles

Setup – Technology to Improve Delivery

A crucial way in which your message is delivered is by your surroundings, how you look, sound and are viewed. You can prepare and practice this using some of the guidelines below:

Lighting

Lighting is a key component to delivering a professional presentation or meeting. It trains the audience to look at the right things and portrays a positive message from the host.

- Look to use a bright window as a main source of light and aim to use the natural light as much as possible.
- Position light sources so they shine on your face and don't come from behind you.
- A simple desk light beside the laptop / recording device shining in your direction should do the job.
- If you would like to go a step further, you can consider purchasing lights such as a USB ring light or umbrella light.

Aim to keep consistent exposure with your phone / camera and practice the settings to lock this for consistency.

Props

Think about what is the most visually appealing part of your business that conveys the messages you want to communicate. It may be your manufacturing process, your people or the product itself. Whatever it is, highlight it and have it in front of camera.

- Use a minimalist desk or setting
- Don't sit in a swivel chair
- Do not have any moving or distracting background pieces (e.g. curtains, videos playing, people)
- Do not have anything included which draws attention away from the speaker(s)

Sound & Video Setup

A poor quality sound and video setup can impair delivery of your message and also become a barrier to how your audience listens. Become aware of your surroundings and do tests in advance.

- Larger rooms naturally have more echoes – and inferior voice capture. Think about finding a smaller room, if possible, with soft surfaces (such as curtains, couches, chairs etc.) to remove this distortion.
- When it comes to sound input, standard built-in microphones are of poor quality. The best way around this is to add a dedicated external microphone which syncs with screen recording.
- A lavaliere (clip-on microphone) is a budget-friendly solution to providing professional sound input.
- Stick or 'shotgun' microphones are more expensive hardware solutions which you may invest in for secondary video production.
- All modern computers and phones should have built-in cameras, but the quality can often be improved. Make sure to check the resolution of your recording device (min 720 pixels). You do not need to consider High Definition high cost solutions, but do consider having a solid camera (and tripod) input to separate your presentation from competitors.
- Webcams are a good investment, worth considering. They can record in high definition and improve the quality of your content.

WiFi Connection

Poor WiFi connections, buffering and the dreaded dropped calls are an experience we've all had. It is so important to miminise risks where possible and control what you can control with your connection.

- Aim for Ethernet / Lan unshared connection. This is the most trusted connection to your laptop or computer.
- The more devices connected on your network, the harder it may be to upload your content. Business and Fibre connections have ample bandwidth to facilitate your meetings, but if you are working from home, minimise family or friends from using your connection for other purposes.

Setup – Positioning

It is important to position yourself just above or at eye level with your camera or webcam. If you don't, the meeting will be from an angle which is unnatural and which may not present you in the best way possible.

- Attempt to centralise your body on screen and frame yourself as the centre-point in the meeting lens.

- Aim to appear from waist up, especially if in a table meeting setting.

Setup – Practice

As with your person to person meetings, practice is vital. Talking to a computer screen is a different experience than in-person and takes getting used to. Different software systems have different controls and you need to know how to share your screen, put yourself on mute etc.

Set up a practice session with someone else in your business and run through the controls and presentations, ensuring that everything works according to plan. Assign yourself a number of tasks to complete in practice – so you know what to do on the day in a confident and comfortable manner.

Delivery – Rapport Building

Virtual meetings can feel quite impersonal. The natural ebb-and-flow of a physical meeting and the advantages of meeting in person are difficult to replicate through a screen.

- Aim to arrive early to a meeting, so if your attendees arrive early you can engage in some friendly introduction before a meeting begins. Build in small talk to your meeting timings and, in advance, try to identify some common areas of interest for conversation. Building rapport, in a friendly and warm manner, will put your attendees at ease and remove some of the barriers to an effective meeting.
- If you are hosting the meeting, always have your cameras on for the duration of the setting and encourage others to do so if possible (and ensure your colleagues' cameras are turned on).



It is important to recognise and appreciate cultural or language differences, particularly if you are meeting an international customer. English will be the common language in the majority of cases, but you can support buyer understanding by providing slides in another language, subtitles for any videos and, if necessary, a translator – it will help separate you from competitors and communicate effectively.

- Be mindful of terms or phrases which you use that may not be well known internationally. Likewise, business terminology of the customer's environment should be learned in advance.

Body Language

When talking, speak to your camera lens and not to the meeting video on your screen. Whether this is the centre point of your laptop or an external webcam, this is the online equivalent of maintaining eye contact with your audience.

- Sit back so colleagues can see your hands and upper-torso so that non-verbal communications are easier (wave, thumbs-up etc.)
- Lean forward slightly to show that you are fully engaged.

- Use hand gestures as you would in a face-to-face meeting. They convey warmth, energy and agreement.

Tone

There is a temptation to become more relaxed or laid back in a virtual meeting (and you may experience this with your customer's tone or body language). It's imperative to set the right tone and to deliver with authority. Remember to present a warm, engaging tone.

Write some key pointers or reminders to deliver beside your screen and let your tone be one of them.

Engagement

With virtual meetings, it is important to interact constantly with your audience. Speak to every participant – remember people's names and address them during the meeting.

- When introducing your team, use a slide with your photo/name/role so that it is easier for the customer to understand who is who and put names to faces. Do this even if you know the customer, it is a useful reminder.
- People zone out much quicker in virtual meetings, so you need to ask lots of questions and avoid speaking too long about a particular topic.
- Consider how you can bring in other colleagues (e.g. Owners/Founders/MDs etc.) to make a short appearance in a way that adds value to the customer conversation and impresses them / demonstrates their importance to you.

Administration and Chairing

It's preferable not to manage an important meeting alone. Your focus needs to be on engagement, listening, querying and responding to your attendees. It's difficult to balance this with roles such as note-taking, muting, sharing, etc.

- If your meeting has more than one person, use chairperson's rules and set expectations around how to engage (e.g. hold up hand, virtual hand raise, video on/off etc.)
- It's your responsibility to make sure all attendees are inputting and feel valued. If you are bringing colleagues with you, ensure they know what their roles are and how the meeting is to be run. Internal conflict or misinformation is damaging to your meeting.

Presentation of Content

If you are hosting the meeting, have all of your documents prepared in advance and ready to share. It is a good idea to share a presentation in advance of a meeting in case of any visibility issues.

- If you have to look for a document, file etc. on your computer (or physical copy), alert your attendees to this as your eye line and movements may indicate a lack of attention.

- If you would like to screenshare (e.g. presentation, software run through, media show etc.), preload and prepare this in advance of the meeting and become 100% confident with the tools you will need to deliver. It is difficult to manage meeting silence and software admin.

When Things Go Wrong

While you can plan, practice and prepare to the best of your ability, naturally sometimes things may go wrong. Connection issues (even sometimes on your customers' side), computer or laptop problems can get in the way of an effective meeting.

It's always best practice to have a Plan B in case of any issues.

- If you are chairing the meeting, or presenting, have someone on hand to deliver (as a back-up) and prep them in case they need to step in.
- Have your complete notes, materials, and presentations ready to be shared immediately with your attendees by a colleague if necessary.
- Finally, it is a good idea to have you customer's phone details collected in advance, in case you need to deliver a presentation of your business to them via phone.

While you would obviously like to have another opportunity to present in the best manner possible, do not waste this opportunity to show your immediate response to a problem as this will be received well by the buyer.

Stage 3: Post Meeting Follow-Up

Post-Meeting Follow-Up and Ongoing Engagement

This is an area that it is possible to stand out in. A buyer is looking to work with suppliers who are professional, reliable and who deliver on their promises. If you can't even get the initial follow-up right, they might question how reliable you will be long-term and they can't afford to take risks here.

It's a mistake to view follow-up as simply 'what you do after a meeting'. To get follow-up right, you need to factor it in from the start. It should inform your meeting planning so that you find out from the customer everything you need to get your follow-up tasks and actions right.

- Think long-term when planning your meeting and have next steps in mind when you meet them: you need to ensure that you ask the right questions in the meeting to enable timely follow up.
- What do you need to know to be able to follow-up in a professional manner? Asking the right questions will allow you to follow-up in a way that responds directly to customer needs. It will also enable you to make informed choices for your business.
- It can be a good idea to capture agreed actions during the meeting so that you both decide on the route ahead and next steps.

Immediately after the meeting: send thanks for their time and remind them of your agreed actions and follow-up times, giving them a chance to clarify anything if required.

It's a good idea to establish straight away who in your company is going to take responsibility for various follow-up actions required after the meeting, to ensure it all gets done in good time. It may be too much for one person, so share the agreed actions and timelines internally after the meeting and make sure each is covered.

Next, it's as simple as **doing what you agreed to**, to prove that you are true to your word.

If there is a genuine reason that you can't deliver on something you agreed to, then simply **advise the customer**, explain why and when you can complete it.

No matter how likely you feel the opportunity is to convert to business, deliver what you committed to. Even if it doesn't bear fruit now you will **leave a positive impression** that may evolve into something down the line.

Don't forget these points when it comes to ongoing engagement; if you work hard to consistently deliver on your promises and communicate clearly with any customer, it will help to develop an open relationship with clear communication in both directions which can stand the test of time.

Conclusion

This document has outlined the three principles to developing your approach for engagement with your customers in an online format. Within each of these, we have detailed key tasks and considerations needed to ensure your message is communicated in the most engaging, professional and efficient manner possible.

By understanding your audience, having clarity on your message and delivering with a clear look and feel, your customer meeting should be delivered in a way that enables the best possible outcome.

If you would like further support to develop a video profile you can contact the Client Capability team at: clientcapability@bordbia.ie

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