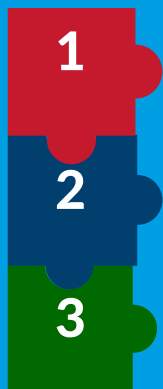


# lockdown 3.0



**1** Many of you will have done this before. If not, start by **TRIAGING** your client base. Segment those that are critical, serious and stable.

**2** **CONTACT** every client in some form, starting with the most critical.

**3** **FOLLOW-UP** with your clients, regardless of whether they respond to your first contact.

## Triage

- We have been here before already but many of your clients will again be feeling vulnerable and uncertain of their futures.
- The best way to tackle the situation is to TRIAGE. That is to identify which of your clients are in a critical condition, those that are serious, and those there are stable or even growing.
- You can triage your clients using Clarity's Portfolio View. That way you have the key numbers of each client on one platform to focus the conversation with. This way you can identify any of the 7 key numbers that look particularly concerning and use the action plans to agree steps to improve them and keep the business resilient.
- A simple spreadsheet will also do the job. Download this template if you are not sure of where to start. Don't rely on your own memory or that of your client's at times like this.

You can download it here: <https://docs.google.com/spreadsheets/d/1dQt8Lopcw1fgwZYm1Rh4OXIg-Jm2ym3NFI0U-P3TEUQ/edit?usp=sharing>

## Contact

- Get in contact with every client. To be done at scale and, to quickly connect with every one of your clients, we suggest that you use EMAIL.
- As this is now the third time we have been into lockdown, many of your clients will be coping fine and will be rolling with the punches. BUT you should still reach out.
- Note: You will need to record the conversations that you are having.

## Follow-up

- If your client doesn't respond, don't assume that means they don't need your help. They may have their head down in their business trying to work out what to do next.
- Focus on their key numbers and suggest a couple of actions they could consider to improve their situation.
- If they do respond, book in that assessment call as soon as possible. The opportunity to talk about their business and agreeing some actions might be enough.
- Some may need a further strategy meeting. Book this in on the call and agree actions to prepare for the meeting.
- REMEMBER: Until this crisis is worked through, you cannot communicate with your clients enough.