



## How to best connect with prospects and turn them into valuable customers

Thank you to [Geoff Campbell](#), MD, [Oxford Abstracts](#), MESA Member, for the MESA Pledge reading.

Thank you for the E-Book Express Showcase (provided by [David Preston](#), CEO of [Realise](#), MESA Member). These are available in the Community Platform – [Trends, Reports, Videos & E-Books \(Files / E-Books / 4M's / September 2024\)](#) or click on the direct links below:

1. **100 Generative AI User Cases** [Link to E-Book](#)
2. **How to Reach Influencers** [Link to E-Book](#)
3. **Cookie Update** [Link to E-Book](#)
4. **Committed to Community** [Link to E-Book](#)
5. **Design to change** [Link to E-Book](#)

**Overview – [Direct Link](#)**

Thank you for the 5 snippets in 5 minutes "My 5 AI Hacks in 5 Minutes" from **Gordon Glenister**, CEO, [Membership World](#) (MESA Member).

1. Bring Ai into workplace training
2. Identify problems in your business
3. Search for solutions that meet them
4. Use the right prompts
5. Shortlist of tools

You can view the slides in the MESA Community – [MESA Events – Summaries & Slides](#) (Files / 4M's 2024 / September) – [Direct Link to snippets slides](#)

## MAIN SESSION SUMMARY:

We emphasised the importance of understanding potential customers' needs, effectively qualifying prospects, and building lasting relationships with clients. Key themes included the need for clear communication, fostering shared interests, and maintaining transparency. We also stressed the role of trust and community in driving customer engagement and loyalty.

### Understanding Customer Needs and Building Relationships:

- **Understand Before You Present:** Make sure you fully understand your potential customer's needs before offering solutions. Pay attention to their body language to gauge engagement
- **Relevant Conversations Matter:** Use the **BANT** model (Budget, Authority, Needs, Timeline) to guide your discussions
- **Active Listening:** Allow your prospect to speak and listen closely to identify their needs. Qualify whether they're the right customer for you
- **Timing Is Key:** Don't rush into presenting solutions. Like the movie [Braveheart](#), wait for the right moment to act

### Converting Prospects into Customers:

- **Start With Their Needs, Not Your Demo:** Focus on understanding their needs first before jumping into a product demo. If they request a demo, express eagerness but prioritise learning about their business first
- **Maintain Relationships Even When They're Not Ready:** Understand that customers might not be ready to buy immediately. Stay in touch and align with their buying timeline
- **Get All Stakeholders Involved Early:** This ensures consistent communication and helps avoid misalignment
- **Tailor Your Approach:** Customise your presentation to meet their unique requirements, avoiding a one-size-fits-all approach
- **Clarify the Next Steps:** Don't make assumptions—ask them directly about decision timelines and who else is involved in the process

## Turning Prospects into Long-Term Customers:

- **Create Shared Goals:** Work alongside your contact to achieve mutual objectives, creating a sense of partnership rather than just a transaction
- **Be an Expert, Not Just a Salesperson:** Offer expertise and value, not just a sales pitch
- **Build Multiple Relationships:** Don't rely solely on one contact within the company—ensure you have connections with multiple people, as team changes are inevitable (also stay in touch with any contact that leaves which can lead to additional opportunities)
- **Broaden Communication Channels:** Strengthen relationships by understanding the full scope of their needs, not just for upselling but also for deeper insights
- **Take Responsibility:** If something goes wrong, owning it will earn respect and trust over the long term
- **Leverage Testimonials:** Encourage your happy customers to share why they chose you—customer referrals often speak louder than self-promotion

## TOP WAYS TO CONNECT WITH PROSPECTS AND TURN THEM INTO VALUABLE CUSTOMERS

1. **Understand their needs first:** Make sure it's relevant and a good match with your offering—ask qualifying questions!
2. **Align missions:** If their goals align with yours, the partnership is more likely to succeed
3. **Build beyond key contacts:** Your main contact may not always remain—establish relationships with a broader network within their organisation
4. **Focus on benefits:** Shift from a product focus to emphasizing benefits, and always consider the customer's lifetime value
5. **Ideal customer profile:** Develop and use a clear customer profile to qualify and identify potential opportunities
6. **Collaborate with your prospect:** Work together with your prospect to address the interests of other decision-makers in their organisation
7. **BANT (Budget, Authority, Needs, & Timeline):** Take these factors into account to fully understand your prospect's requirements
8. **Consider the customer journey:** Focus on the on-going customer experience and how you can nurture the relationship over time
9. **Engage key stakeholders:** For large contracts, get to know additional stakeholders, sponsors, and PCOs (Professional Conference Organisers), which could lead to more clients
10. **Stay present after the sale:** Continue to engage with your customers post-sale to ensure satisfaction, identify new opportunities, and foster long-term loyalty

**Please provide your feedback on this session – we would love to hear what you say!**

Thank you to our speakers:

Host/Moderator **Jelmer van Ast**, Founder & CEO of **Conference Compass**, MESA Patron Member / **Panellists:**

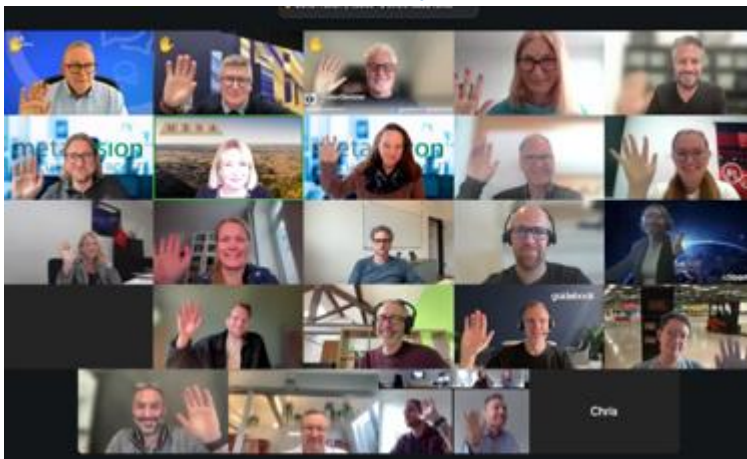
**Leslie Robertson**, Founder & Owner of **Open Audience**, MESA Member

**Tamsin Treasure-Jones**, Co-Founder of **Kubify**, MESA Member

**Thomas Berghausen**, Co-Owner of **meta-fusion**, MESA Member

**David Preston**, CEO of **Realise**, MESA Member

**Gordon Glenister**, CEO, **Membership World** (MESA Member)



**NEXT MEETING:**

**MESA MONTHLY MEMBER MEETINGS (4M's) 1400 BST / 1500 CEST:**

**Wednesday 31<sup>st</sup> October: Main topic: Engagement and Communication at Events (and in our own teams) Across Generations**

**Moderated by [Richard John](#), COO of [Realise](#)**

We look forward to seeing you there!

**[MESA Events page](#)**

**[MESA MONTHLY MEMBER MEETINGS \(4M's\)](#)**

For those that can join us at ibtm, meet with MESA on Stand P52 – Find out more [MESA at ibtm 2024](#)

[Please connect to our LinkedIn page](#) Thank you, MESA MEMBERS!

Remember: You are in the MESA Community Platform (Intranet wall) -Please post content and connect with each other