

WHAT IS RELATIONSHIP MAPPING & HOW CAN IT HELP YOU? [+ TEMPLATES]

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Account Manager Tips



What is Relationship Mapping & How Can It Help You? [+ Templates]

Relationship mapping helps you identify and engage with decision makers and influencers to win, retain and grow your key accounts.

People buy from people. In fact 6.8 people to be exact.

In a 2016 study, CEB Global found the average number of customer stakeholders that have to formally sign off on a B2B purchasing decision was 6.8.

The people on buying teams are represented from all over the organisation – I'm sure you've found that yourself. Everyone seems to have an opinion and as a supplier you need to manage these diverse priorities to avoid deadlocks and get decisions made.

To add fuel to that complex relationship fire, the [US Bureau of Labor Statistics Employee Tenure Report](#) revealed in 2018 the average worker (that's you and me) stays in a job 4.2 years.

It's even less for workers aged 25 to 34. Guess how long they stick around for?

Only 2.8 years!

So with people coming and going and [sales decisions made by committee](#), you really need solid multi-level relationships with decision makers and influencers to help you win, keep and grow your client base. To do that, you need to start relationship mapping

What is a relationship map?

Relationship maps are the blueprint to identify, engage and grow your network of contacts in the most effective way and answers question like:

- Who are the key stakeholders?
- What are their goals?
- How influential are they?
- Do they have any interest in your business relationship?
- What do they need from you?
- How do they feel about you (do they like you, hate you or somewhere in between)?
- What actions can you take to grow engagement?

Benefits of relationship mapping

Relationship mapping helps you win new clients, keep the ones you have and unlocks revenue growth because you are connecting with the right people, uncovering their challenges and then solving them.

You'll also understand the quality and strength of your relationships, where the risks are and where to focus your time and energy.

Build the right relationships with the right people.

By proactively managing relationships with the right people you'll:

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- Earn trust and credibility.
- Get repeat business.
- Gain referrals and recommendations.
- Avoid formal processes (like presentations, reports and proposals).
- Spend more time strategic initiatives because your client listens to your advice.
- Improve customer retention.
- Get things done – fast track stuff!

How to create a relationship map

Grab a pen and paper – or download this [Relationship Mapping Template](#) for Excel – choose one of your key accounts and write down:

- Who do you know well?
- Is there anyone you need to know better?
- Who don't you know at all (instead of names, write down job titles or department names)?

Then add some extra dimensions.

Categorise your contacts by who are the:

- **Influencers.** Who has the most say on the future of your partnership?
- **Users.** Who actually use your product or service and how do you help them succeed?
- **Leaders.** Who are the Executives that have the power to raise concerns or put up roadblocks?
- **Decision makers.** Who controls the resources?
- **Budget holders.** Who has a financial stake?

Then, consider if they are a:

- **Supporter.** Who is on your side?
- **Detractor.** Who doesn't like you and actively tells people?
- **Champion.** Who absolutely loves your company and sings your praises even when you're not around? People that do the selling for you!


Finally, think about the quality of your relationships. I use colour coding:

- Red = Weak
- Amber = Good
- Green = Strong

After going through this exercise you may discover there's a bunch of people who aren't as important as you thought. Take them off the list, you don't need to worry about them for now.

There'll be others where you need to do a bit more digging to understand the relationship more.

You'll then be left with as solid of list of where to engage – it should be only on those people who are critical to your success.

 **TIP:** Ask your main point of contact for for a copy of their organisation chart. Then site them down and ask who they think you need to keep happy. They'll be delirious you asked because happy stakeholders will make their life easier.

What's the plan, Stan?

It's time to put your strategic hat on and decide how you'll strengthen, expand and develop these relationships.

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Ask yourself:

- What motivates your stakeholders?
- How can you help them achieve their goals more easily (especially in ways they hadn't considered)
- What else can you do to turn them into champions?
- What do you need from them and what do they need from you?
- How is your success linked to theirs?
- What is your course of action to develop these relationships?
- How will you communicate with them and how often? For instance, executives may need less frequent but more formal communication, like a quarterly presentation that reports key performance indicators.

Include activities in your relationship map that grow engagement. Some ideas for you:

- Host a brainstorming session to uncover challenges and potential solutions.
- Arrange a training session that helps them use your services more effectively.
- Share a case study or white paper relevant to their role or industry.
- Call and follow up on a survey response or an incident.
- Send updates on things your working on by explaining what's happening, when and why
- Share a useful report or presentation.

💡 **TIP:** Yes, Account managers are the ultimate owner of the relationship between your organisation and your client, but you simply can't be the sole point of contact for every single relationship in your clients' organisation.

Where it makes sense, introduce subject matter experts to each other. Marketing people to marketing people, finance to finance. Maybe your boss could play a bigger role in connecting with your clients' senior management?

Relationship mapping tools

Pen and paper or spreadsheets are great places to start but if you want to kick it up a notch, think about using some online tools to create your relationship maps. These will inspire your creativity and keep you on track with your engagement plans.

Mindmeister



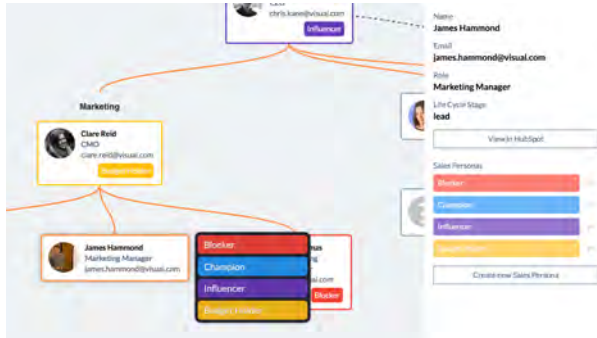
Mind mapping is the perfect way to create relationship maps and Mindmeister is a free tool that makes it so easy. Grab a copy of my relationship mapping template to get started. Then just fill in the blanks. Colour code your nodes based on relationship strength and use the comments feature to add insights.

I really like the integration with TaskMeister because in the click of a button you can create a laser-focused project plan for those difficult customers and turn them into into champions.

Mindmeister pricing: free for the [Basic plan](#) with 3 mind maps (get one additional map (for a total of 10) for each person who signs up for an account using your referral link). From \$4.99/month for the Personal plan including unlimited mind maps, attachments and exports.

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OrgChartHub



Part of Hubspot's CRM ecosystem – but available as a standalone solution – you can create up to 5 charts on a free account.

Visualise your accounts, see key stakeholder roles and understand relationships at a glance. You can set different personas and a really neat feature is the ability to put placeholders for unknown stakeholders and swap them out with contact details once you've identified them. Draw lines between contacts to map out relationships and focus your energy and engagement where it's needed.

OrgChartHub pricing: free for the Starter plan with 5 relationship maps. From \$50.00/month for the Basic plan including 50 maps.

Lucid Charts



LucidCharts offers a full suite of visual drawing tools to understand the political landscape of an organisation, who to target and how to best reach them.

Plenty of templates to easily build diagrams, create plans and show progress so you spend time where it counts.

LucidChart pricing: Free for up to three documents. From \$4.95/month for the [Basic plan](#) which includes unlimited documents, shapes and 100mb of storage.

Relationship maps
create influence with
the right people.

Relationship maps are the secret to grow influential relationships with your customers.

If you'd like to know more about how this strategy can work for you to create profitable partnerships with your clients, arrange a discover ycall with Account Manager Tips today.

[LEARN MORE](#)



Account Manager Tips serves organisations who want to optimise their account management solution and develop efficient, effective and sustainable strategies that grow client revenue and reduce churn.



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