

Relationship Management Checklist

Strong relationships are often the difference between winning work and being overlooked. This checklist is designed to help regional businesses establish and maintain meaningful connections with decision-makers in major projects and procurement teams.

BEFORE YOU REACH OUT

- ☐ Know your value proposition (What makes your business valuable to a buyer?)
- ☐ Research the project or organisation (Understand their goals and procurement needs)
- ☐ Identify the right contact person (Use LinkedIn, ICN Gateway, or attend events)
- ☐ Prepare your capability statement (Tailored to the specific opportunity)

FIRST CONTACT

- ☐ Be clear and concise in your introduction
- ☐ Ask how and when they engage suppliers
- ☐ Offer to meet informally or attend a relevant briefing or event
- ☐ Respect their time and communication preferences

BUILDING THE RELATIONSHIP

- ☐ Follow up after meetings or introductions with a brief thank you and recap
- ☐ Share relevant updates about your business (new projects, accreditations, local hires)
- ☐ Attend Meet the Buyer and industry networking events
- ☐ Stay visible through platforms like ICN, C-Res, and relevant industry forums
- ☐ Be responsive, reliable, and consistent in your communication

MAINTAINING LONG-TERM RELATIONSHIPS

- ☐ Check in periodically without always asking for work
- ☐ Invite buyers to visit your premises or local operations
- ☐ Offer to collaborate or support information sessions in your region
- ☐ Provide feedback professionally if you miss out on a tender
- ☐ Stay engaged even if there is no immediate opportunity

KEY MINDSETS FOR RELATIONSHIP MANAGEMENT

- ☐ Focus on trust, not just transactions
- ☐ Be helpful and informative, not sales-driven
- ☐ Think long-term, not short-term wins
- ☐ Understand that business is built on people, not just documents