

CRESITA LLC NEWSLETTER

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Leadership

Leadership is a multi-faceted topic but today I want to focus on perspectives. I am of the belief that viewing the world from your office can be dangerous. I say this because I have seen a perspective develop where people can fail to appreciate the needs of both internal and external customers. I do believe that getting out of the office and speaking to all people about how your product, service or position can make their life easier is important.

Let me be clear this is not a commentary on whether I support remote work but more of a commentary about developing a plan to obtain feedback on your product, service or role. There are a number of ways to do this, below are a few thoughts:

Write and Review Trip/Intelligence Reports-The trip/intelligence report is a simple and effective way to gather information when you or a co-worker attends an event. I know that at the moment these may be a pain to write but given that not everyone can make an event it certainly makes sense to record the observations of the staff person who attends the event or encounters a situation and share them with others. These reports should be as objective as possible and avoid a personal interpretation of the intelligence gathered, when reported.

In the moment, these reports may not yield breakthrough results but over time they can provide perspectives that can lead to improvement of products or services or even new products or services. In contemporary terms this could be considered a form of “crowdsourcing.” I always appreciate reviewing these reports for events that I did not attend and a review of these reports and a discussion of them can provide the basis for more productive staff meetings. In any event, these reports can help an organization decide if participation in a future or similar event is worthwhile, as there is usually no shortage of

industry events to attend and it is most likely difficult to attend them all. The tradeshow is the most common industry “event,” but intelligence can be gathered from any interaction.

I would consider developing a template with headings in place to make sure that the most pertinent information for your company is captured. One straightforward way to do this is to add section which is a simple check box where those in attendance can decide if future attendance is worthwhile. While future attendance can be a simple yes / no answer, the rationale will almost always be telling. As a manager, give some consideration to having different staff attend, to be sure you obtain a variety of perspectives.

Visit with Customers – Make sure you schedule some face-to-face time with your customers. Face time can be obtained in multiple ways, one way is the classic customer visit, another is your attendance at key industry events. I recall one group I worked with that a decision was made not to attend a certain trade show because they often saw the same people at other events. The few times they did participate in an event was when the trade show was close to staff who did not normally have an opportunity to visit with customers in that setting.

Be Thoughtful and Plan – I think it is important to be thoughtful and plan which events you will participate in. Think about the ROI and hold thoughtful discussions about what events your company should attend, including why and who. I would advise you to leave some wiggle room in your budget as sometimes unforeseen opportunities present themselves. In my mind, there is no substitute for thoughtful planning. I would say that there should be a travel budget with a rationale for attendance attached to each event, to me, this is part of the marketing budget.

Pre-event Briefings- I would say pre-event briefings are important for multiple reasons. One reason is that the briefing can provide the person or persons attending with planning information about the meeting. Another reason would be to share the goals and objectives of the meeting or event. A third reason could be a review of the expectations for the person(s) staffing the event, including the timeline for filing a report on the activities.

So many organizations feel that collecting customer information is not possible and to that I would say that there may already be opportunities, both formal and informal, that you can draw upon. In earlier issues we discussed the value of the information gathered by customer service representatives as well as simple survey opportunities. In conclusion, I would say many organizations have multiple opportunities to gather information about the needs of their customers as well as the products and services they need and use. Get out there and just don't stay in your office wherever that may be!

Let me know if you want to discuss any of these matters, mention this article and be eligible for a 10% discount on the services offered by Cresita. You can reach me at bill@cresitallc.com.