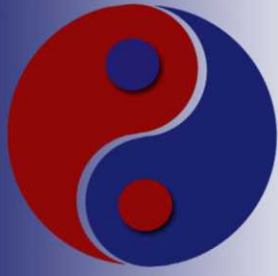


*First Creation Consulting*



***Client Management  
Skills for Client  
Service Managers***

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## WORKSHOP AIM:

The aim of the workshop is to develop the participants' client management skills so that they are able to offer a high level of client support and develop further business opportunities.

## WORKSHOP OBJECTIVES:

### **By the end of the workshop participants will be able to:**

- Understand the role of the Client Service Manager
- Understand the key skills and behaviours required to successfully carry out the role of a Client Service Manager
- Understand the client base and their different requirements
- Successfully produce an account plan
- Demonstrate effective self management when organising & prioritising work flow
- Develop and manage positive client relationships
- Identify and adopt client focused activities
- Plan and prepare to manage a client review meeting
- Use a sales model which recognises the importance of identifying client needs and buying criteria and match the products/services of the firm to the requirements of the client
- Effectively give negative feedback to the client without harming the relationship
- Effectively manage difficult, complaining or dissatisfied clients

## WORKSHOP METHODOLOGY

The workshop has been designed to maximise participant involvement. A number of proven methodologies will be employed including:

- Consultant led input
- Group/individual based exercises
- Feedback and Coaching

## **Day One**

**Start 9:00**

### **Introduction**

- Introduction & overview of Client Service Manager Programme by Pat Hayes
- Workshop aims & objectives

### **Introduction to Relationship Management**

- Role & responsibilities, managing the transition
- Key skills & behaviours
- Developing a client focused approach
- Client expectations of service provider- What the client wants!
- Developing client relationships

### **Understanding the Business**

- Business growth
- Clients
- Products
- Client requirements

### **Account Planning**

- Key components to account planning
- Analysis
- Prioritisation
- Information matrix
- Process & strategy
- Building an account plan

### **Self Management**

- Work planning, new key responsibilities
- Prioritisation, client V's administration
- Organisation
- Time management

### **Developing Positive Client Relationships**

- Interpersonal skills & communication skills
- Developing & building client relationships
- Johari window – a model of interpersonal relationships
- Individual survey & feedback

**Action Plan** – Development of Personal Account Plans for presentation at beginning of next module

**Finish 18:00**

### **Summary & Close**

## **Day Two**

**Start 9:00**

### **Presentation of Account Plans to Senior Management**

Participants' will be asked to present their account plans prepared after attending module 1 to senior management

#### **Maintaining Contact with the Clients**

- Communicating with the client
- Methods of communication – Why & When
- Reason for the meeting
- Formal
- In-formal
- Brainstorming

#### **Structuring & Managing the Meeting**

- Conducting the review
- Structuring the meeting
- Opening the call
- Identifying & developing client needs/requirements
- Identifying solutions – Features & Benefits
- Handling client resistance & gaining commitment
- Internal communication

#### **1st Client Meeting Role-Plays**

Participants will conduct a client review meeting using real client case studies

Review and debrief – coaching for improved performance

#### **Dealing with Difficult Situations or Clients**

- Avoiding complaints and client dissatisfaction
- Emotions & attitudes, behaviour & skills
- Key steps to successfully managing client complaints
- Dealing with different client types
- Managing conflict
- Managing client expectations - Service– Realistic & acceptable

#### **2nd Client Meeting Role-Plays**

Participants will conduct client meetings using real client case studies

*Review and debrief – coaching for improved performance*

**Finish 18.00**

### **Summary & Close**