Client Service Administrator | Learning Objectives and Assessment tasks

Area	Focus Area	Module	Learning objectives	Assessment tasks
1	Client Service Excellence and Support	Structure and responsibilities for a CSA role	1. Understand the key factors leading to a stronger role for professional services administrative roles 2. Identify what key changes need to take place in your firm in relation to client services administration 3. Explore the roadblocks that are preventing you from taking on a stronger client support role	1. How client-centric is your firm? Do you have a statement of purpose in relation to client services? If so, how well is this statement reflected in staff behaviour? If not, spend a little time considering the core values and actions that should be part of such a statement 2. Identify all the roles that the administrative team could take on in relation to client management. Which of these roles are not currently managed by the administrative team? What are the issues preventing the team from taking on more responsibility for these roles? 3. Identify all the roles that the administrative team could take on in relation to workflow management. Which of these roles are not currently managed by the administrative team? What are the issues preventing the team from taking on more responsibility for these roles? 4. Start developing your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. At this stage, don't assess the urgency of these actions, just consider their importance.
2		Principles of client relationship management	1. Understand the importance of managing client expectations within a professional service firm 2. Understand the role of the CSA in the effective delivery of client services Review key client contact points relevant to administrative services	1. How would you gauge the firm's current level of focus on client service levels (refer to slide 8). What would clients say? What needs to be improved? 2. Explore your firm's approach to client care. Review the client service charter example provided in slide 17. How many of these service statements are documented within your firm? 3. Review the list of key client contact points outlined in slide 20. Which of these is the administrative team currently responsible for? Which could become the responsibility (in full or in part) of the client services team?

				4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. Consolidate actions from each module into one action list for ongoing review.
3		Engagement, pricing and debtor management	1. Understand the key levers for effective client engagement, pricing and debtor management strategies 2. Put in place actions to take control of client engagement, pricing and debtor management from a CSA perspective 3. Identify and address any roadblocks to implementation	1. Critically review the firm's approach to client engagement and re-engagement. Consider what role the CSA can take in establishing a clearer focus on engagement. 2. Discuss the firm's approach to pricing with senior management. Consider how a more standard and/or centralised approach could reduce pricing issues and fluctuations. 3. Calculate the firm's current debtor days. Identify a target based on industry benchmark data. Describe 3 actions that the CSA can take to achieve the target. 4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. Consolidate actions from each module into one action list for ongoing review.
4		Client segmentation and marketing strategies	1. Explore the value of the CSA in driving marketing initiatives for the professional service firm 2. Understand the value of client segmentation in identifying opportunities 3. Identify key actions that you can take in relation to marketing activities on behalf of your firm	1. Identify all the key marketing activities undertaken by the firm. Which of these are, and could be, co-ordinated by the administrative team? 2. Based on the information presented in this module, consider what steps you could take to improve the effectiveness of the firm's newsletters to clients. Consider the source and nature of content, the frequency of ebulletins and targeting strategies to clients. 3. Design a simple monthly report to provide a summary of at least 5 key metrics to the business development team in relation to marketing and business development activities. 4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop

				their own list of actions. Consolidate actions from each module into one action list for ongoing review.
5	Workflow and task management	Personal time and task management for CSAs	1. Understand the key issues affecting your ability to take control of your work environment 2. Identify and address the key timewasters for administrators in public practice	1. Identify your key time management challenges [refer to slide 14]. Reflect on the causes of these challenges? What specific actions can you take to address these challenges? 2. Keep track of all interruptions for a week. Identify the main interruptions and estimate the time lost due to these interruptions. What specific actions can you take to deal with these interruptions? 3. Put in place a structure for your working week. If you already have one, consider what you could do to improve the way you get through the week. Are you able to manage all your responsibilities at this time or do you need more support (or better systems)? 4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. Consolidate actions from each module into one action list for ongoing review.
6		Effective capacity and workflow scheduling	1. Identify the capacity requirements for your firm's CSA team 2. Critically review team roles and responsibilities in relation to workflow management 3. Implement a workflow scheduling system for your firm	1. Calculate the number of administrative staff as a percentage of total staff (full-time equivalent) in your firm. How does this compare with industry benchmarks? Is there a need to review roles and responsibilities? 2. Develop an administrative capacity spreadsheet using the example in slide 11. Identify tasks and allocate to staff. Estimate the average weekly or monthly time taken to complete tasks. What does this tell you about administrative capacity in your firm? 3. Consider the value of a more formal approach to the scheduling and calling in of work in your firm. What role does the CSA team currently have in relation to this? How could they provide greater support to better manage workflow within the firm?

				4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. Consolidate actions from each module into one action list for ongoing review.
7		Managing the throughput of work efficiently	1. Understand the value of focusing on turnaround time as a key indicator of workflow performance 2. Explore the key principles affecting the throughput of work in a professional firm environment 3. Put in place key steps to take control of throughput and turnaround time	1. Map the flow of traditional work in your firm. Identify the key steps, who is responsible, what information is required, what procedures, documents and templates are used. 2. With feedback from the production team, identify reasonable turnaround time targets for the most common workflows in your firm. Are these targets in place? Are they achieved consistently? 3. What key bottlenecks can affect the delivery of these targets? Consider work-in procedures, follow-up of information requests, existing capacity, the review process and others. What can the CSA team do to address these bottlenecks? 4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. Consolidate actions from each module into one action list for ongoing review.
8		Workflow management and reporting systems for 2020	1. Identify the key elements of an effective workflow management and reporting system for a modern accounting or advisory firm 2. Critically review the workflow management system that your firm uses. Identify areas for development. 3. Critical review workflow reporting systems to add value to the firm	1. Critically review the effectiveness of the firm's current system and processes in relation to workflow management. Use the checklist provided. What is working well? What could be improved? 2. Identify the information that staff require on a consistent basis in relation to workflow. Is this information readily available? Is it accurate? Identify at least 3 areas for improvement in relation to workflow reporting. 3. How does the firm manage the flow of work associated with projects and special matters? What could the CSA team do to improve this? 4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop

				their own list of actions. Consolidate actions from each module into one action list for ongoing review.
9	Teamwork and Collaboration	Teamwork within the administrative team	1. Explore the level of teamwork and collaboration within the administrative team 2. Identify roles and responsibilities in relation to client management 3. Identify roles and responsibilities in relation to workflow management	1. Ask each member of the administrative team to provide feedback on the quality of teamwork and collaboration. Use the survey template provided. Identify key areas for improvement. 2. Critically review all current and potential administrative functions in relation to client management. What can the CSA team to support the firm? 3. Critically review all current and potential administrative functions in relation to workflow management. What can the CSA team to support the firm? 4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. Consolidate actions from each module into one action list for ongoing review.
10		Working effectively with the technical team	1. Identify the key areas of day to day contact with the technical team 2. Explore key challenges and roadblocks to more effective communication 3. Identify key steps to improve teamwork and communication within the firm	1. Using the checklist provided, identify the key areas of day to day contact between the CSA and technical teams. What are the key challenges in managing internal professional relationships? 2. Identify at least 3 areas where more effective communication could improve the way the CSA team supports other staff and clients. Discuss with the firm's management team. 3. Explore the ways in which persuasive skills could be used more effectively internally to get things done. Document your thoughts and relate back to at least one potential action. 4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. Consolidate actions from each module into one action list for ongoing review.

11		Collaborative systems for knowledge sharing	1. Identify areas where the sharing of information is critical for client and workflow management 2. Explore systems and processes that can be used to improve the sharing of knowledge and information within the firm	1. Identify any internal systems and processes used to share information in relation to client relationship management. How effective are these systems? What could be improved? 2. Identify any internal systems and processes used to share information in relation to workflow management. How effective are these systems? What could be improved? 3. Discuss with the technical team what information they require from the CSA team to effectively complete their tasks. Document the feedback and consider what needs to change. 4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. Consolidate actions from each module into one action list for ongoing review.
12		Staff key performance indicators and reporting	1. Explore the role that the CSA team can take in relation to the measurement of individual and firm performance 2. Develop a list of useful reports that should be used by individuals, teams and the firm on a regular basis	1. Critically review the firm's current approach to firm, team and individual KPI reporting systems. Ask the management team for feedback. Identify up to 5 potential areas for improvement. 2. With support from the management team, put together a reporting process that can be used to communicate firm progress vs objectives to the whole team on a regular basis. 3. Critically review the firm's approach to individual performance review and provide recommendations to the management team, using the checklist provided. 4. Continue to develop your list of potential SMART actions as per the template provided. Ask each team member to develop their own list of actions. Consolidate actions from each module into one action list for ongoing review.