CPDForAccountants
Self-Paced E-Learning Courses

Client Manager | Learning Objectives and Assessment tasks

Module	Focus Area	Learning objectives	Assessment tasks
1	The New Age Client Service Manager - The responsibilities of the client manager in 2020 and beyond	1. Understand the role and responsibilities of a 'new age' Client Manager 2. Explore your motivated abilities in relation to workflow, teams, clients and growth 3. Explore your firm's client service charter. To what extent is it documented? Is it reflected in team behaviour?	1. Complete the 4Q Performance Map. What does this tell you about the areas you need to focus on over coming years? What role will client relationship management have in helping you to achieve your professional development goals? 2. Identify any firm documents or policies that reflect on the way the firm engages with its clients. Summarise these documents in point form. Review what they mean to you in your role now. You will need this information in developing your personal client service charter in Module 2 of this course. 3. Revisit your results in the personal survey 'How strong are your client relationship management skills? (support materials). Ask a colleague or your manager to complete the form based on their assessment of your strengths. What observations can you take from their feedback versus your assessment? 4. Identify at least 3 SMART actions you will implement as a result of your learnings from this module. Add to the consolidated SMART action list.
2	Your personal client service standards - Develop your own	1. Identify the firm's expectations of you in relation to client relationship management 2. Explore your personal standards in relation to client engagement and communication	1. Consider what 'client service excellence' means to you. Describe 3 instances where you delivered outcomes to clients that could be regarded as 'excellent.'

	client service excellence program	3. Outline key actions that you can take in your role as a manager to engage with clients	2. Develop your personal client service charter based on 5 aspects of your engagement and communication with clients. Use Slide 3 as a starting point. With each area of focus, establish specific SMART guidelines for measurement and review 3. Consider what you can do to improve the number and quality of ongoing touch points with clients. These touchpoints may include, but should not be specific to tax compliance work. 4. Develop at least 3 personal and/or firm SMART actions for this module. Check that actions are specific, not general. Incorporate in your consolidated SMART action spreadsheet for ongoing review.
3	Establishing scope of work and fee - Establish clear terms of engagement with service agreements	1. Implement an effective engagement process for ALL your clients 2. Understand the difference between a contract and a service agreement. 3. Identify and use appropriate technology, systems and processes to assist with client engagement	1. Critically review the firm's current engagement documents. Consider what could be changed to turn these documents into service agreements. 2. Document the process of client engagement and re-engagement. What could be done to encourage more communication and real engagement with clients during this process? 3. Consider the value of client service levels in negotiating agreements with clients in relation to both process and outputs of service delivery. What can your firm do to more clearly explain service levels to clients? 4. Identify up to 3 individual or firm SMART actions from this module. Incorporate in your consolidated SMART action list.

4	Management of client expectations - Ongoing management of scope of work and fee for service	1. Understand the key issues leading to variations in scope of work and fee for service 2. Implement a 10 step process for effectively and proactively managing changes in scope of work	1. Review the process the firm has adopted to establish the right fee for services up front. Consider what further steps could be taken to ensure that the fee takes into account the full nature of advisory projects. 2. Identify how variations in scope of work are managed within the firm. Who is responsible? Are these issues dealt with proactively? What needs to change in order to take better control of pricing as matters proceed? 3. Review the 10 steps process for managing scope of work outlined in this module. Identify specific actions that you can take now to better manage scope and fees as jobs proceed. 4. Identify up to 3 individual or firm SMART actions from this module. Incorporate in your consolidated SMART action list.
5	Management of client workflow - How to manage workflow at a compliance and advisory level	1. Understand the key steps in effectively managing job turnaround and deadlines 2. Outline the key steps required to manage job time cost budgets 3. Identify the key actions to take if workflow gets out of control	1. Explore your firm's approach to job turnaround and deadlines. How does this influence the way that you start and complete jobs? What suggestions do you have for changing the way you and the firm manages jobs? 2. Take a detailed look at 2 clients where WIP consistently exceeds the fee for service. What could you do differently to better manage the time cost budget associated with the jobs you complete? 3. Develop a checklist to monitor the key steps in delivering jobs on time, within budget. Focus on dealing with the key challenges that you

			currently experience in relation to workflow management. 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
6	Client communication strategies - Communication strategies to engage consistently with clients	1. Understand what 'client communication standards' means 2. Identify your personal training and coaching needs in relation to client communication 3. Identify systems and procedural changes required to achieve strong communication standards	1. Document communication standards and procedures associated with response to client queries. Consider leverage, timeliness, quality. Establish as your personal service standard in engaging with clients. 2. Identify up to 3 specific performance indicators that can be used to monitor the firm's approach to client communication. How do you rate in relation to these KPIs? 3. What key challenges have you identified in relation to your communication with clients? Outline some actions you can take to address these issues? Consider external training or changes in systems or processes. 4. Identify up to 3 individual or firm SMART actions from this module. Incorporate in your consolidated SMART action list.
7	Dealing with difficult clients - How to manage challenging clients and difficult situations	1. Take responsibility for proactive communication with clients 2. Explore the best ways to service all client types in a proactive way, consistent with client expectations and the fee that they pay 3. Identify how to address the different types of challenging situations involving clients	1. Identify 2 difficult clients where you feel you can improve the professional relationship. They may include clients who provide information slowly or in a poor condition, clients who always want more for the fee, clients who complain about the fee or clients who never pay invoices on

			time. Outline what you can do, proactively to address the issue with these clients. 2. Do you have any clients that you would like to 'fire?' What are the alternatives for dealing with these clients? 3. Based on the information presented in this and previous modules, document the steps that you are going to take to improve the quality of professional relationship with your clients. 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet
8	Reframing client relationships - Key steps to introduce new services to existing clients	1. Review the success (or otherwise) of strategies firms adopt to get more value from existing clients 2. Explore the keys to effectively refresh and reframe client relationships to add new value to existing clients	1. Identify 3 clients who currently receive a compliance service who would benefit from an advisory relationship. What is preventing these clients from seeing the opportunities? 2. Consider the RAIN selling approach outlined in this module. Can you identify a situation where you rushed towards a solution without really engaging the client up front? What could you do differently to generate interest in new services? 3. Review the 10 key steps to refresh and reframe client relationships outlined in slide 32. Which of these steps can you focus on personally to improve the quality of client relationships? 4. Develop at least 3 SMART actions for this module. Incorporate in your consolidated SMART action spreadsheet

9	Client feedback and review processes - How to ensure that you're remaining relevant to your clients	1. Identify the key methods of receiving useful client feedback in relation to service levels and future opportunities 2. Set up a feedback process for your clients 3. Address specific challenges and roadblocks to effective implementation of a client feedback process	1. Critically review your firm's approach to formal client feedback. Discuss options including feedback forms and net promotor score. Agree on next steps. 2. Incorporate client feedback on service levels as part of your client meetings e.g. agenda item for annual client review meeting, discovery meeting. Develop a list of simple open-ended questions you can ask clients. 3. Develop a process to identify client advocates – those clients who will refer you to other clients when the opportunity arises. These clients believe that your service levels are exceptional. 4. Identify at least 3 SMART actions (personal or firm-based) for this module. Incorporate in your consolidated SMART action spreadsheet
10	10 projects to really engage with clients - Practical actions you can take to develop client relationships	1. Review 10 projects to really engage with clients. Explore opportunities consistent with your motivated abilities. 2. Develop a formal client relationship development program based on your clients and your goals. 3. Explore and address any roadblocks to success with client relationships.	1. Explore how you can create more time to develop client relationships. Can you set aside 10% of your productive time for these activities? What are the firm's expectations of you in relation to this project? Discuss with your manager. 2. With reference to the '10 projects' to develop client relationships, identify 3 projects that you can implement over the next 12 months. For each project, document the key goal and the next step. Which of these can you start working on now? 3. Identify the key roadblocks to implementation of your client relationship management program.

			Document steps that you will take to overcome these roadblocks and share these with your manager. 4. Identify at least 3 SMART actions (personal or firm-based) for this module. Incorporate in your consolidated SMART action spreadsheet

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