CPDForAccountants
Self-Paced E-Learning Courses

Client Concierge | Learning Objectives and Assessment tasks

Module	Core Topic	Learning objectives	Assessment tasks
1	Introduction to Client Concierge	1. Understand the role and importance of Client Concierge 2. Learn the key skills required for Client Concierge 3. Get an overview of the course content	1. Share the sample position description of a Client Concierge with your firm's leadership / management team. Ask them for feedback on the role as you develop your firm's position description. 2. Identify at least 3 key performance indicators relevant to the Client Concierge role, based on the options discussed in this module. How will you measure these results? 3. Complete a client service audit using the questionnaire provided in supporting resources (this may take you some time, so you may wish to add this to your SMART action list.) 4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module. Document in your consolidated SMART action list for ongoing review.
2	Client Onboarding and Engagement	1. Define client onboarding and why it is important 2. Discover best practices for successful client onboarding 3. Explore strategies for effective client engagement	1. Develop a flowchart outlining your firm's approach to client onboarding. If necessary, provide separate workflows for different types of clients or services. Where are the gaps? What can be improved? 2. Review your firm's new client information questionnaire. Is this being used effectively to gather all information required to understand the client? If an information form does not exist, develop a SMART action to create it. 3. Identify a recent client relationship issue that could have been avoided through a stronger focus on onboarding. What could you or your firm have done differently? 4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module.

			Document in your consolidated SMART action list for ongoing review.
3	Client Relationship Management	1. Learn about the client lifecycle and how this relates to engagement 2. Develop effective communication and relationship-building strategies 3. Discover how to manage client expectations and handle complaints	1. Does your firm have any formal approach to classifying or profiling clients. How can this assist you to identify client needs in relation to service and support? What needs to change to improve the way your firm profiles clients? 2. Review the core communication skills required for effective client relationship management (slide 30). Assess your strengths and weaknesses in relation to these skills. What could be improved? 3. Identify a difficult clients where you feel you can improve the professional relationship. They may provide information slowly or in a poor condition, always want more for the fee, complain about the fee or never pay invoices on time. Outline what you can do, proactively to address the issue with these clients. 4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module. Document in your consolidated SMART action list for ongoing review.
4	Client Feedback and Review Procedures	1. Understand the importance of client feedback for business success 2. Discover how to collect and analyse client feedback 3. Learn how to implement action plans based on client feedback	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 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 up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module. Document in your consolidated SMART action list for ongoing review.
5	Client Connections and Marketing	1. Develop a client contact strategy 2. Create effective marketing messages for clients 3. Learn how to measure the effectiveness of client contact and marketing efforts	1. Complete the 5 step process for rating client contact levels with each area of potential contact (refer to document in supporting resources). What actions can you take as a result of this analysis? 2. Based on the information presented in this module, consider what steps you could take to improve the effectiveness of the firm's 'knowledge-based' communication with client. 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. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module. Document in your consolidated SMART action list for ongoing review.
6	CRM Business Systems and Processes	1. Discover how to create efficient and effective client communication systems 2. Learn how to streamline client service administration processes 3. Explore how to maximise productivity through automation and delegation	1. Develop a list of core CRM software platforms in your firm. How reliable is the client information within your CRM? To what extent is client data integrated? 2. Does the firm undertake any client segmentation (consider client classification or targeting strategies)? If so, describe these. If not, what areas of focus could result in additional service opportunities for the firm? 3. How does your firm document and manage business development opportunities? IS there any formal approach or is it largely ad

			hoc? Outline strengths and weaknesses of your current approach. What could be improved? 4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module. Document in your consolidated SMART action list for ongoing review.
7	Developing a Client Service Charter	1. Understand the benefits of a client service charter 2. Learn about the key elements of a successful client service charter 3. Discover strategies for implementing a client service charter	1. Develop a preliminary client service charter using steps (a) to (c) outlined in this presentation. Ensure that the charter relates back to the firm's core values 2. Identify specific behaviours (incorporating existing systems and processes) that relate back to each element of the client services charter (step (d) of the presentation) 3. Discuss the role of individuals, at every level of the firm, in delivering exceptional service to clients. Ensure that everyone understands their role. Identify any roadblocks. 4. Identify up to 3 personal, team or firm SMART actions that you can take in relation to your learnings from this module. Document in your consolidated SMART action list for ongoing review.
8	Putting it All Together	1. Review the key concepts covered in the course 2. Develop a personalized action plan for elevating client service administration 3. Get tips for ongoing improvement and success	1. Ensure that your consolidated SMART action list is up to date. Check priorities, responsibilities and deadlines. Share with someone else (your manager or mentor) 2. Identify which SMART actions will require firm support or approval to proceed e.g. changes to systems or processes. Confirm next steps with these actions. 3. Identify the top 3 potential roadblocks to implementation of your actions. Outline what you will do to address these roadblocks in a proactive manner.

			4. Establish your 90 day action plan. Confirm the initial 5 SMART actions, outline what needs to happen and keep track of progress through your personal task management system