

OUTLINE FOR REMAINING THE INCUMBENT CLIENT MANAGEMENT LEADERSHIP TRAINING

OVERALL THEME

“Understanding, Managing and Exceeding Client Expectations”

OVERALL GOAL

Agency’s client will say: My agency, my account managers are real heroes. They are truly my business partners in the real sense of the meaning. They not only do great work, they are great people to work with. They come to me with new ideas and business solutions that help me do my job better. They know how to build my business in ways that I would never have thought. They are a true asset to me and my company. I can’t imagine what I would do without them.

DAY ONE

Start time: 9:00 a.m.

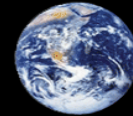
- I. Introductions
 - a. Louws
 - b. Trainer
 - c. Participants
- II. Overview for the day
 - a. Agenda
 - b. Rules of training
 - c. Objective for the next 2 days
- III. Define and gain agreement on the meaning of “Account Management”
 - a. POV from the agency
 - b. POV from the client
 - c. Overall, definition
- IV. What does Client expectations mean? What does ‘managing’ client expectations mean? What does ‘exceeding’ client expectations mean?
 - a. Define needs and wants of the client

Break: 10:30 a.m. (15 min)

- b. Discovery process for client expectations
 - i. Role play exercise for this section
 1. What have we learned?
- V. Identify and define the skills and traits needed for stellar (“A+”) Account Management around client expectations

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- a. Strategic insights
- b. Results driven
- c. Financial management

Lunch Break: 12:00 p.m. (1 hour)

- d. Project management, deadlines, etc.
- e. Asking & Listening (no stupid questions)
- f. Creating a partnership
- g. Anticipation
- h. Follow-up/meeting reports/checking in/status
 - i. Role play exercise for this section
 - 1. What have we learned?

Afternoon Break: 3:00 p.m. (15 min)

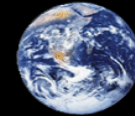
- VI. Identify and define the processes and tools needed to exceed client expectations
 - a. SOW
 - b. Managing client dictates with the team
 - c. Job briefing with teams (meeting management)
 - d. Time documentation
 - e. Estimates/project costs
 - i. Accuracy
 - ii. Transparency
 - iii. On-going management of costs
 - f. Wrapping a job up...it's finished...now what?

End first day: 5:00

DAY TWO

Start Time: 9:00 a.m.

- VII. Identify the challenges and the problems that occur during the execution process
 - a. Revision management
 - i. Miscommunication from the client
 - b. Mistakes from the agency
 - i. Cost overages
 - ii. Missed deadlines
 - iii. End product is not what the client wanted
 - iv. Miscommunication internally



Break: 10:30 a.m. (15 min)

- v. Role play exercise
 - 1. How to manage internally?
 - 2. How to manage the client?
 - a. What did we learn?
- VIII. What it takes to build a true relationship with your client, not just an 'order taker'.
 - a. Building trust
 - b. Being a leader
 - c. Being their true partner
 - d. Being proactive
 - e. Understanding their business, the category
 - f. Being a thought-leader
 - g. Bringing solutions, not problems with no answers
 - i. Role play exercise

Lunch Break: 12:00 p.m. (1 hour)

- IX. Managing different client personalities and client levels
 - a. What are those personalities?
 - b. Do you manage clients differently because of their title?
 - i. Role play exercise
- X. The basics, the obvious, why they are critical...it does matter
 - a. Written communication
 - i. Meeting reports
 - ii. E-mails
 - b. Verbal communication
 - i. Telephone
 - 1. Conference calls
 - ii. Meeting management
 - iii. Presentation
 - c. Professional manners/dress/behavior
 - d. Being just 'good, smart and a delight' to work with

Break: 3:00 p.m. (15 min)

XI. Series of role play exercises that combine multiple scenarios and challenges in the course of a day and the life of a project

XII. Summary from the 2 days