

MODULE 1

Objective – To maximise and pilot the skills required for delivering an enhanced relationship focus to your practice.

Process – One to one and group learning interventions, followed by a series of high quality pilot interactions with the target clients to track the development of the relationship.

1. Which clients to pilot – How to select which target clients to focus on, and why.
2. Relationship Types and Mapping - Mining and multiplying the value in your existing collective relationships.
4. Client objective setting – Creating your “key client matrix”.
4. Qualifying the account matrix – Identifying the appropriate level of investment and the key client measures for success.
5. The business analysis toolkit – A framework for end to end analysis of your practice to find opportunities for enhanced relationship focus.
6. Profession to business – A coaching programme that transforms the way fee earners see themselves in their role.
7. Client interaction phase – A client engagement pilot to drive quick wins for communication across the firm.

Deliverables – A relationship focus pilot, leading to a case study for further exploration.

MODULE 2

Objective – To take what you have learned from your client relationship development pilot, to co - design and implement account plans that deliver great client experience.

Process – Review of pilot, design of internal strategy and resource to support account plan, and securing internal agreement to support account plan.

1. Creating client relationship based account plans – identifying what really matters to clients, and building a common strategy to deliver the experience the client wants.
2. Accountability – Doing the resource planning to support client relationship based account plans.
3. Workflow analysis – How to align great client listening and client engagement with great service in every matter.
4. Billing – transforming your relationship to the value you deliver.
5. Cross selling- why we find this hard and making it easier.
6. Internal comms – securing buy in.

Deliverables – A detailed strategy and buy in for delivering great client service through enhanced focus on relationship.

MODULE 3

Objective – To implement an ongoing process for enhanced client relationship through client listening.

Process – Action based phase of the programme to monitor, adjust and support delivery of great client experience.

1. Your new metrics – A comparative analysis of utilization, recovery, client retention and other key professional services, as a driver for enhanced relationship focus.
2. Your new personal objectives - Tying the new relationship focused metrics into your own personal performance.
3. Your new relationship based practice infrastructure - The co creation with the client of an ongoing structure for review and alignment between client listening and client experience.

Deliverable – A transferrable methodology for delivering great client experience that becomes part of your firm’s DNA.