Client Management Solutions

Client Management?

Client engagement

Clients are the foundation of your success and engaging with clients beyond just the sales pitch makes all the difference

Set and manage realistic expectations

Continuously hitting targets and delivering on time will gain reputation for reliability

Respond to clients quickly

Quick response to inquiries, feedback or comments leaves a lasting impact

Document important information

Documentation can bring this up again in future conversations and clients will know you really listen when they speak

Client Management Challenges

Growing client expectations for service value

Internet and globalization is creating a worldwide market for professional services, escalating competitive pressure. In response, firms must keep client satisfaction high and solidify a reputation for delivering high-convenience and high - quality service.

Distant client relationships provide openings for competitors

To foster and maintain client interactions, firms need to help their professionals be available to clients and enable new levels of service convenience and transparency.

Inadequate controls over liabilities stemming from client service activities
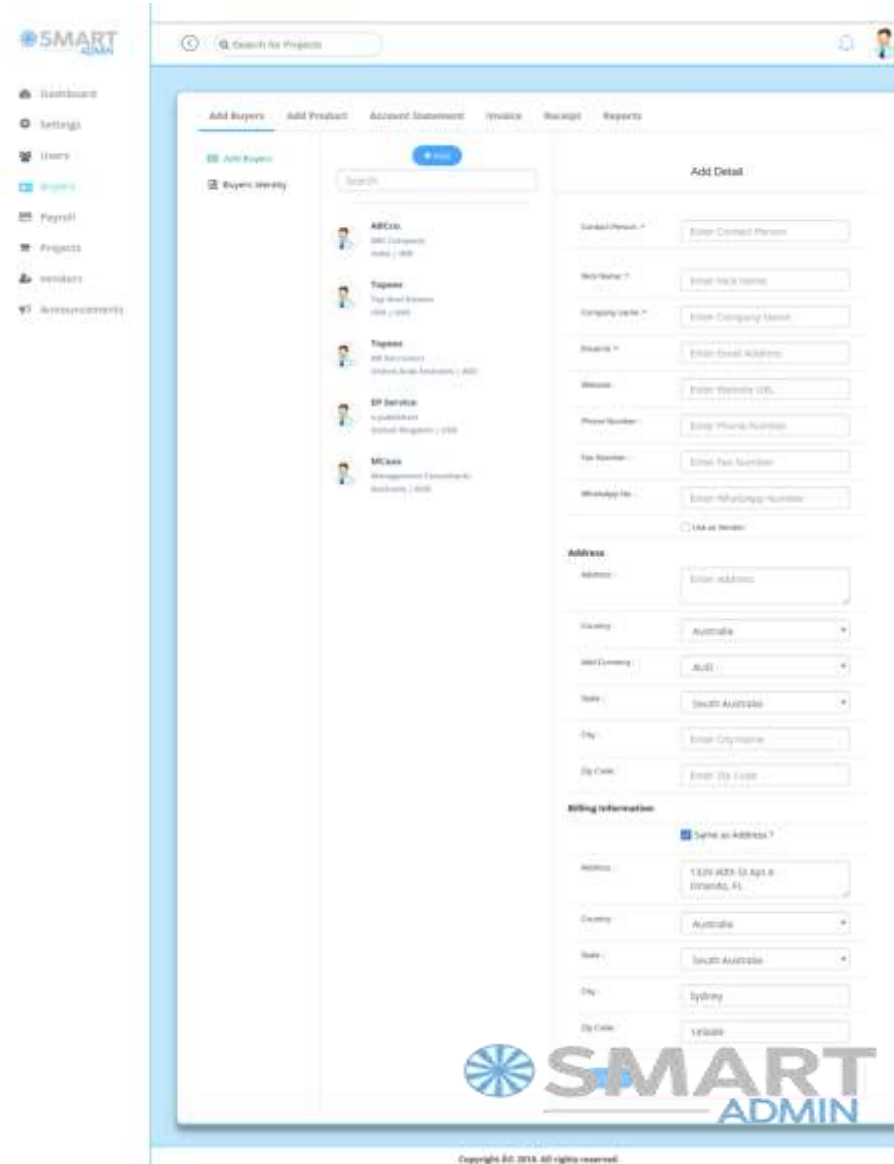
Data security, privacy concerns, and associated legislation have elevated the risk of transferring and storing sensitive client data. These compel firms to invest in and publicize protective measures for client information.

Client Management - Features

- Helps to store client data accurately with all associated data points.

- Personally identifiable data are stored in encrypted mode.

- Option to complete KYC data points of a client and link associated documents for compliance purpose. The authorized persons can access important details when they need it.

- Client's data are linked with projects discussed, work completed, payment done, and more

- The invoice history, project data, and client activities can be brought out using multiple tools of client management.

- Can add more clients or delete existing one with proper approval.

Client Management - Benefits

- Better client relationships

- Improved ability to cross-sell

- Increased team coloration

- Improved efficiency in serving clients

- Increased revenue and profitability

- Greater staff satisfaction

- Cost savings

- Less client attrition

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