Chapter 08: Administrative and Financial

13. Client Account Management in CRM

Manage client accounts in CRM system to maintain accurate client information and support relationship management.

Purpose

Establish systematic client account management procedures that ensure accurate client information, support relationship building, and enable effective communication while providing insights for business development and service improvement initiatives.

Roles and Responsibilities

Client Service Representative:

- Manage client communications and service requests
- Process documentation and billing
- Obtain client authorizations and approvals
- Coordinate scheduling and aircraft availability
- Maintain professional client relationships

Business Leader:

- Approve marketing budget and resource allocation
- Review financial projections and business development strategies
- Provide strategic direction for market expansion
- Monitor competitive positioning and pricing strategies
- Oversee vendor contracts and supplier relationships

Operations Leader:

- Oversee daily operations and coordinate between departments
- Authorize emergency response procedures and resource allocation
- Monitor safety compliance and operational excellence
- Coordinate scheduling across departments for operational coverage
- Review billing disputes and approve service adjustments
- Ensure regulatory compliance across all operations

Process Steps

Account Setup Phase

- **Create client profiles** - Establish new client accounts with complete contact and aircraft information
- **Verify client information** - Confirm accuracy of contact details, aircraft data, and service preferences
- **Set communication preferences** - Record preferred contact methods and communication frequency
- **Establish service history** - Document initial services and create baseline for future interactions

Information Maintenance Phase

- **Update contact information** - Maintain current addresses, phone numbers, and email contacts
- **Record aircraft changes** - Update aircraft ownership, registration, and specification changes
- **Track service preferences** - Document client preferences for fuel, hangar, catering, and other services
- **Maintain billing information** - Keep current billing addresses and payment method preferences

Interaction Documentation Phase

- **Record service interactions** - Document all client contacts including services provided and issues resolved
- **Log communication history** - Maintain record of phone calls, emails, and in-person meetings
- **Track client feedback** - Record compliments, complaints, and suggestions for service improvement
- **Note special requirements** - Document any unique client needs or accommodation requests

Relationship Analysis Phase

- **Monitor client activity** - Track service frequency and spending patterns for relationship health
- **Identify growth opportunities** - Analyze client needs for additional services or expanded relationships
- **Generate client reports** - Create summaries of client activity and relationship status
- **Plan follow-up activities** - Schedule proactive communications and relationship-building initiatives

Process Mapping

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flowchart TD

A[New Client] --> B[Create Account]
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B --> C[Verify Information]

C --> D[Set Preferences]

D --> E[Record Services]

E --> F[Update Information]

F --> G[Analyze Relationship]

G --> H[Plan Follow-up]

H --> E

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# Tools and Resources

- **CRM Software**: Client relationship management system with aviation-specific features
- **Client Database**: Centralized repository for all client information and history
- **Communication Templates**: Standardized formats for client correspondence
- **Service History Reports**: Detailed records of all services provided to each client
- **Analytics Dashboard**: Client relationship metrics and performance indicators
- **Mobile CRM Access**: Field access to client information for line service team

# Success Metrics

- **Completion Time:** Client account updates completed within 24 hours of service delivery or information changes.

**Quality Standard:** 98% accuracy in client contact information with less than 2% returned communications.

**Safety Standard:** Aircraft information accuracy supports proper service delivery and safety compliance.

**Client Satisfaction:** CRM data supports personalized service resulting in 95% client satisfaction ratings.

# Common Issues and Solutions

- **Issue:** Incomplete or outdated client information affecting service delivery and communication
- **Solution:** Implement regular client information verification procedures and establish annual client data review process. Train team members to update information during each client interaction.

**Issue:** Multiple team members updating same client records causing data conflicts
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Solution: Establish clear data ownership rules and implement CRM system with conflict resolution capabilities. Train users on proper update procedures and coordination requirements.

Issue: Client privacy concerns about information storage and usage

Solution: Develop clear privacy policies and obtain client consent for information usage. Implement data security measures and provide clients with access to their information.

Safety Considerations

⚠️ **WARNING:** Ensure aircraft information accuracy in CRM to prevent service errors that could affect flight safety

⚡ **CAUTION:** Protect confidential client information with appropriate access controls and security measures

ℹ️ **NOTE:** Maintain accurate emergency contact information for all clients to support incident response

✅ **BEST PRACTICE:** Use CRM data to anticipate client needs and provide proactive service excellence

Regulatory References

- **14 CFR Part 91** - General Operating Rules (aircraft identification and service requirements)
- **Privacy Act** - Protection of personal information and data security requirements
- **State Privacy Laws** - Applicable state regulations for client information protection
- **Company Privacy Policy** - Internal procedures for client information handling and protection