



Client Management

From the options below, identify three instances where Maeve went wrong in the meeting with Renae.	Available Options	Chosen Option	Feedback
Michael: "Seems like that was a difficult meeting. What do you think were the low points?" From the options below, identify three instances where Maeve went wrong in the meeting with Renae.	<ul style="list-style-type: none"><li>It was unclear that Maeve understood the client's objectives by the end of the meeting.</li><li>Maeve asked the majority of questions.</li><li>Maeve did not listen to the client.</li><li>Maeve was too strict in controlling the meeting.</li><li>Maeve did not take notes.</li><li>Maeve should have persuaded Renae to stay longer.</li></ul>	<ul style="list-style-type: none"><li>It was unclear that Maeve understood the client's objectives by the end of the meeting.</li><li>Maeve did not listen to the client.</li><li>Maeve did not take notes.</li></ul>	<p>Maeve's meeting with Renae was sub-optimal because of the following shortcomings, among others:</p> <p>It was unclear that Maeve understood the client's objectives by the end of the meeting. Maeve did not listen to the client. Maeve did not take notes.</p> <p>Maeve also talked too much about irrelevant things and the client became frustrated. Maeve did not do her research before meeting the client.</p>
Professional Conduct	Available Options	Chosen Option	Feedback
Maeve should have behaved in a courteous and professional manner. What do you think? "Was she professional?" Michael asks you. How would you rate this client meeting?	<ul style="list-style-type: none"><li>Professional</li><li>Somewhat unprofessional</li><li>Completely unprofessional</li></ul>	<ul style="list-style-type: none"><li>Completely unprofessional</li></ul>	<p>Maeve did not prepare for the meeting. She:</p> <p>Was impatient with the client and kept interrupting her.</p> <p>Did not listen to the client.</p> <p>Did not take notes.</p> <p>Did not do her research before meeting the client.</p> <p>The meeting was completely unprofessional.</p> <p>Can you add any further observations regarding Maeve's unprofessional conduct and its possible effects to:</p> <p>the process of client management generally? preparing briefs specifically?</p> <p>Make a note of these for your workshop.</p>
Winning the Client	Available Options	Chosen Option	Feedback
"Based on this meeting, what do you think is the likelihood that the client will choose to give the contract to this consultant?" Michael asks you. What do you say? Rate the likelihood of Maeve winning the contract.	<ul style="list-style-type: none"><li>Very likely</li><li>Moderately likely</li><li>Not at all likely</li></ul>	<ul style="list-style-type: none"><li>Moderately likely</li></ul>	<p>You've selected the correct option.</p> <p><b>Claim:</b> It is moderately likely, despite the unprofessional way in which Maeve conducted the meeting.</p> <p><b>Reason:</b> Renae points out that she approached <i>MESH Digital Consultancy</i> because it was recommended to her and she knew the company's CEO. She hopes they may work together in future.</p>
A Successful Meeting	Available Options	Chosen Option	Feedback



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<p>"You just viewed a video of an optimal client meeting. How do you think Maeve made it an effective one?" Michael quizzes you. Do you have the answers? Select three factors that you think made the meeting effective.</p>	<ul style="list-style-type: none"><li>▪ Maeve had a clear understanding of the scope of the project.</li><li>▪ Maeve kept the meeting short.</li><li>▪ Maeve took notes and asked the client questions.</li><li>▪ Maeve was friendly but professional.</li><li>▪ Maeve did not try to promote her own organisation.</li><li>▪ Maeve did not make Renae uncomfortable by asking questions about her role in HHA.</li></ul>	<ul style="list-style-type: none"><li>▪ Maeve had a clear understanding of the scope of the project.</li><li>▪ Maeve took notes and asked the client questions.</li><li>▪ Maeve was friendly but professional.</li></ul>	<p>These are some of the most important ways in which Maeve made the client meeting optimal:</p> <p>Maeve had a clear understanding of the scope of the organisation's proposed project by the end of the meeting. She took notes and asked the client questions to clarify certain points. She was friendly but professional.</p> <p>Notice that she also asked about the target audience, budget and timeline; and she promoted and represented her company's past projects well.</p>
Professional Conduct	Available Options	Chosen Option	Feedback
<p>Maeve should have behaved in a courteous and professional manner. In the initial meeting, she was unprofessional. "Was she professional this time?" Michael asks you. How would you rate this client meeting?</p>	<ul style="list-style-type: none"><li>▪ Professional</li><li>▪ Somewhat unprofessional</li><li>▪ Completely unprofessional</li></ul>	<ul style="list-style-type: none"><li>▪ Professional</li></ul>	<p>Maeve was professional. She:</p> <p>prepared well for the meeting. did her research and went to the meeting with a strong understanding of the client and her needs. promoted and represented her company's experience and expertise well. was friendly, but professional, and put the client at ease.</p>
Winning the Client	Available Options	Chosen Option	Feedback
<p>"Based on this meeting, what do you think is the likelihood that the client will choose to give the contract to Maeve?" Michael asks you once more. What do you think? Rate the likelihood of Maeve winning the contract.</p>	<ul style="list-style-type: none"><li>▪ Very likely</li><li>▪ Moderately likely</li><li>▪ Not at all likely</li></ul>	<ul style="list-style-type: none"><li>▪ Very likely</li></ul>	<p>You've selected the correct option.</p> <p><b>Claim:</b> It is very likely that the client will choose Maeve because of the thoroughly professional way in which she conducted the meeting.</p> <p><b>Reason:</b> She was able to impress the client with her:</p> <p>research pertinent questions knowledge ability to educate the client on relevant issues</p>
Analysing the Brief	Available Options	Chosen Option	Feedback
<p>Have you studied the brief well? Why do you think Michael says it's a great brief? Which three of these features make this written brief optimal?</p>	<ul style="list-style-type: none"><li>▪ It gives a good background on the organisation and their current web presence.</li><li>▪ The scope of the project is clearly outlined.</li><li>▪ It collates all the information meaningfully.</li><li>▪ It is a summary document.</li></ul>	<ul style="list-style-type: none"><li>▪ The scope of the project is clearly outlined.</li><li>▪ It gives a good background on the organisation and their current web presence.</li></ul>	<p>The brief is optimal because:</p> <p>It gives a good background on the organisation and their current web presence. The scope of the project is clearly outlined.</p>






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Elements of an Optimal Brief	Available Options	Chosen Option	Feedback
A written client brief is an alternative to the verbal brief and the basis for creating a reverse brief, which, in turn, is the document that guides the entire project team. Take a look at the elements in the client's brief. Which three of these elements do you think make the client's written brief optimal?	<ul style="list-style-type: none"><li>Objectives are clearly defined.</li><li>Technical requirements are defined.</li><li>Project requirements are clearly outlined.</li><li>Web analytics are presented.</li><li>Details about tone of communication are included.</li><li>The target audience is defined.</li></ul>	<ul style="list-style-type: none"><li>Objectives are clearly defined.</li><li>Project requirements are clearly outlined.</li><li>The target audience is defined.</li></ul>	<p>These are the most important elements that make the brief optimal:</p> <p>Objectives are clearly defined. Project requirements are clearly outlined. The target audience is defined.</p> <p>The other options are subject to later research.</p>
Gaps in the Brief	Available Options	Chosen Option	Feedback
Renaë's brief, though optimal, had some gaps. Some of the information required to create a reverse brief was missing from it. Identify two gaps in the brief that need to be filled in order to create a complete reverse brief.	<ul style="list-style-type: none"><li>Names of the management team</li><li>Technical resource requirements</li><li>Web analytics of the present website</li><li>Availability of an ongoing budget to maintain technology</li></ul>	<ul style="list-style-type: none"><li>Availability of an ongoing budget to maintain technology</li><li>Web analytics of the present website</li></ul>	<p>These are important gaps in the information provided by the client brief that would be useful in formulating the reverse brief:</p> <p>Whether web analytics of the present website are available If there is a budget available on an ongoing basis to maintain technology</p> <p>The other options are not important at this stage, or are subject to later research.</p>
Describing the Brief	Available Options	Chosen Option	Feedback
A good written brief goes a long way in helping you create a reverse brief. Which option correctly describes the client's brief?	<ul style="list-style-type: none"><li>Lacks sufficient detail for creation of a reverse brief</li><li>Has sufficient information for a reverse brief, but will have to refer to client for one piece of information</li><li>A reverse brief can be easily created from this brief without referring to the client for additional information</li></ul>	<ul style="list-style-type: none"><li>A reverse brief can be easily created from this brief without referring to the client for additional information</li></ul>	<p>A reverse brief can be easily created from this brief without referring to the client for additional information.</p>
Gaps in the Sub-optimal Brief	Available Options	Chosen Option	Feedback
The sub-optimal brief has gaps. Can you guess what they are? Identify two typical gaps that make this brief sub-optimal.	<ul style="list-style-type: none"><li>Budget and timeline are not included.</li><li>Too many points are included, even if they are relevant.</li><li>Information from the client's website is included.</li><li>The scope of the project is unclear.</li></ul>	<ul style="list-style-type: none"><li>Budget and timeline are not included.</li><li>The scope of the project is unclear.</li></ul>	<p>A written client brief is sub-optimal when it fails to present all information required for creating an effective reverse brief. This brief is sub-optimal because:</p> <p>The scope of the project is unclear. Budget and timeline are not included.</p>
Other Gaps	Available Options	Chosen Option	Feedback
Any brief that fails to provide complete and authentic information is a sub-optimal brief. Identify three elements that made this brief sub-optimal.	<ul style="list-style-type: none"><li>Key stakeholders are not listed.</li><li>Technical requirements are not defined.</li></ul>	<ul style="list-style-type: none"><li>Key stakeholders are not listed.</li><li>Budget and timeline are not defined.</li></ul>	<p>Other critical gaps that reduce the value of this brief are:</p>

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three elements that made this brief sub-optimal.	<ul style="list-style-type: none"><li>Technical requirements are not defined.</li><li>Budget and timeline are not defined.</li><li>Expectations are unrealistic.</li><li>Client needs are unclear.</li><li>The tone of the campaign is not defined.</li></ul>	<ul style="list-style-type: none"><li>Budget and timeline are not defined.</li><li>Client needs are unclear.</li></ul>	<p>Key stakeholders are not listed; this means the target audience is not properly defined. The client's budget and timeline are not included; therefore you cannot judge if you have the capacity, time-wise, detail-wise or resource-wise to fulfil it, as you are unclear as to what their budget is.</p> <p>Client needs are unclear; this makes the brief almost useless, since this is the very purpose of the brief.</p> <p>The brief provides too little detail to create a reverse brief.</p>
Scope	Available Options	Chosen Option	Feedback
"First of all, you must help Maeve define the scope of the project," Michael tells you. "Start by prioritising. We'll include the five most important elements in this section." Here are two of them: 1)Aims/goals 2)Budget and timeline Identify three more elements that should be included in the scope of the project in the reverse brief.	<ul style="list-style-type: none"><li>CEO requirements</li><li>Competitors</li><li>Location</li><li>Existing campaign</li><li>Tone of campaign</li><li>Project requirements</li></ul>	<ul style="list-style-type: none"><li>Competitors</li><li>Existing campaign</li><li>Project requirements</li></ul>	<p>These five elements should feature in the scope of the project in the reverse brief:</p> <p>Aims/goals Budget and timeline Competitors Existing campaign Project requirements</p> <p>All the others are research elements that can be included at the proposal stage.</p>
Strategy Statement	Available Options	Chosen Option	Feedback
"Now that you have prioritised and set down the elements you need to include in the brief, help Maeve write a strategy statement that describes what you are setting out to do," says Michael. Which of these statements best describes your task, based on the client brief? Consider the options carefully by thinking about the purpose of a strategy statement in the context of this client.	<ul style="list-style-type: none"><li>Create a web communications campaign, update the existing website, and populate and drive traffic to social media and website. Create an app and develop an SEO, research and analytics strategy.</li><li>Update the website, establish social media accounts and get on the first page of Google.</li><li>Develop an integrated web communications campaign with an essential web portal supported by social media, and development of mobile app. Support the strategy with research and analytics, and develop an SEO plan to support the content and information architecture strategy.</li></ul>	<ul style="list-style-type: none"><li>Develop an integrated web communications campaign with an essential web portal supported by social media, and development of mobile app. Support the strategy with research and analytics, and develop an SEO plan to support the content and information architecture strategy.</li></ul>	<p>This option gives a complete statement of the strategy expected for the campaign:</p> <p>Develop an integrated web communications campaign with an essential web portal supported by social media, and develop a mobile app. Support the strategy with research and analytics, and develop an SEO plan to support the content and information architecture strategy.</p> <p>The other options are incomplete strategy statements.</p>
Communications Plan	Available Options	Chosen Option	Feedback
"Next," Michael instructs you, "help Maeve choose a communications plan. Prioritise the top five elements that should be in this plan." He points out two obvious selections: 1)Message 2)Target audience	<ul style="list-style-type: none"><li>Background problem/opportunity</li><li>Budget</li><li>Campaign aim</li></ul>	<ul style="list-style-type: none"><li>SMART objectives</li><li>Background problem/opportunity</li><li>Campaign aim</li></ul>	<p><b>These five elements should be covered in your communications plan in the reverse brief:</b></p> <p>Background problem/opportunity Campaign aim</p>



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Obvious selections: 1)message 2)target audience Identify three more elements from the list below that you think should be included in the communications plan.	<div>Campaign aim</div> <ul style="list-style-type: none"><li>Channels and tactics</li><li>Evaluation</li><li>SMART objectives</li></ul>	<div>Campaign aim</div>	<div>Campaign aim</div> <div>Message</div> <div>SMART objectives</div> <div>Target audience</div> <div>All the others can be included at proposal stage or do not belong to this section.</div>
Technology Plan	Available Options	Chosen Option	Feedback
"Web campaigns include technological elements," says Michael. "So the next important section is the technology plan." He mentions two obvious elements in this section: 1)Domain name registration 2)Servers Can you think of other elements that make the top five in the technology plan? Prioritise the list below by identifying three elements that should be in the technology plan.	<ul style="list-style-type: none"><li>Content management system</li><li>Data security</li><li>Data storage</li><li>Hosting</li><li>Software and hardware</li><li>Social media platforms</li></ul>	<ul style="list-style-type: none"><li>Hosting</li><li>Content management system</li><li>Social media platforms</li></ul>	<div>These five elements should be covered in your technology plan in the reverse brief:</div> <div>Content management system</div> <div>Domain name registration</div> <div>Hosting</div> <div>Servers</div> <div>Social media platforms</div> <div>All the others are either research that can be included at proposal stage or do not belong to this section.</div>
Content Plan	Available Options	Chosen Option	Feedback
"This is a communications campaign, so content is all-important," says Michael. "We must have a content plan, including research and analytics, in place." He mentions two obvious elements in this section: 1)Media 2)Target audience Can you think of other elements that make the top five in the content plan? Prioritise the list below by identifying the three other elements that should be in the content plan.	<ul style="list-style-type: none"><li>Digital assets</li><li>Expertise</li><li>Information architecture</li><li>Primary and secondary research</li><li>SEO</li><li>Web analytics</li></ul>	<ul style="list-style-type: none"><li>Web analytics</li><li>Primary and secondary research</li><li>Information architecture</li></ul>	<div>These five elements should be covered in your content plan in the reverse brief:</div> <div>Media</div> <div>Information architecture</div> <div>Primary and secondary research</div> <div>Target audience</div> <div>Web analytics</div> <div>All the others are either research that can be included at proposal stage, or do not belong to this section.</div>
Creative Plan	Available Options	Chosen Option	Feedback
"How we get the message across is an exercise in creativity," says Michael. "We must have a creative plan to guide our creative department." He mentions two obvious elements in this section: 1)Branding 2)Look and feel Can you think of other elements that make the top five in this section? Prioritise the list below by choosing the three other elements that should be in this section.	<ul style="list-style-type: none"><li>Creative expertise</li><li>Information architecture</li><li>Layout</li><li>SEO</li><li>Skins</li><li>Voice</li></ul>	<ul style="list-style-type: none"><li>Creative expertise</li><li>Information architecture</li><li>SEO</li></ul>	<div>These are five elements that should feature as part of your creative plan in the reverse brief:</div> <div>Branding</div> <div>Creative expertise</div> <div>Information architecture</div> <div>Look and feel</div> <div>SEO</div> <div>All the others are elements that can be included at proposal stage or do not belong to this section.</div>