CitiusTech

CitiusTech: Effective Client Relationship Management

February 2014

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Client Relationships: Fundamental Drivers

Five Key Drivers of Client Satisfaction Account for 70% of the Service Quality Ratings

Client Communication

1. Timeliness
2. Courtesy, Comfort
3. Knowledge, Competence
4. Fair Treatment
5. Outcome

Client Communication and Timeliness

- Client Communication & Timeliness is by far the most powerful drivers
- Client communication failure is the most important source of client dis-satisfaction

* Erin Research Inc. *Citizens First,* 1998.

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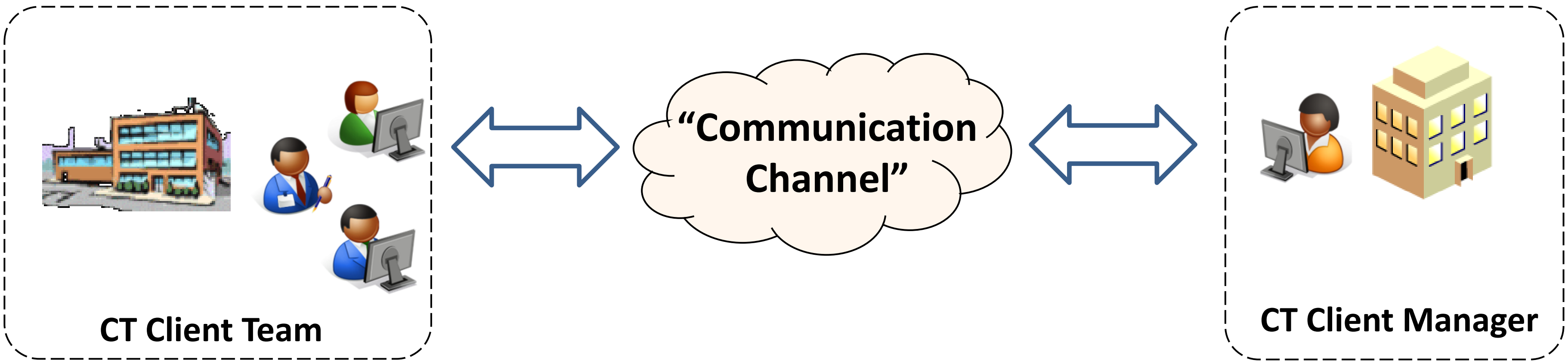
Client Communication Frameworks



- **What** to communicate?
- **When** to communicate?
- **How** to communicate?
  - What channel to be used for communication?
  - What are the best practices for an efficient communication?

Client Communication Content ("What")

CT Client Team

Client Communication Content

1. CT Objectives

- Primary and Secondary objectives/ goals

2. Audience

- Goals/ objectives
- Skill level/ interest
- Bias – positive or negatives

3. Key messages

- Based on (1) and (2)
- Relevant/ fulfill goals
- Structured
- CT Example

CT Client Manager

Client Communication Frequency (“When”)

CT Client Team

Client Communication Frequency

1. Ongoing

- Regular daily updates
- Monthly / Quarterly program updates

2. One-time

- New program implementation
- Changes in program requirements / reporting etc.

3. Need-based e.g., project issues, technical issues, absenteeism, attrition

CT Client Manager

Client Communication Channel ("How")

CT Client Team

Client Communication Options

1. **Written Communication**
   - Text Email
   - Standard Report
   - Others e.g., web-chat
2. **Phone Communication**
   - Scheduled conference call
   - Need based phone call
3. **Face-to-face Communication**

CT Client Manager

Client Communication Channel: Select the Right Channel

Type of Communication	**Written** (Text Email)	**Written** (Standard Report)	**Verbal** (Scheduled Conference call)	**Verbal** (Need based phone call)
Ongoing : Regular daily updates / Monthly / Quarterly program updates		Preferred – for both daily and monthly/ quarterly review	Preferred – ideally do a quick recap of information already contained in written report	
One-time: New program implementation, Changes in program requirements / reporting etc.		Preferred – Have standard format in which information is communicated – reduce need for free text emails	Preferred - ideally do a quickly recap of information already contained in written report	
Need-based: Problems e.g., Telecom issue, absenteeism, attrition	Send email to reinforce action plan / give client comfort			Preferred – Esp. for big issues

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Client Communication Key Factors (How)

Face to Face

- Words = 25%
- Spoken Tone = 25%
- Body language = **70%**

Phone

- Words = 40%
- Spoken tone = 60%
- Body language = 0%

Written (Email)

- Words = 100%
- Spoken tone = 0%
- Body language = 0%

Best Practice: Emails

DOs

- Structure
  - Use the Pyramid Principle (top down or bottom up)
  - Use sections/ grouping of thoughts
  - Use bullet points and numbering rather than big paragraphs
  - Define clear NEXT STEPS… with clear "Leads" and "Due Date
- Language
  - Simple and easy to understand
  - Concise – a dollar for every word !
  - Correct grammar and punctuation

DONTs

- Provide too much detail - esp. not relevant to the key issue(s)
- Use a single e-mail for multiple topics
- Use jargon or slang or abbreviations
- Use redundancies in your language
- Inconsistent greeting / signature
- Multiple fonts / multi-colored backgrounds

ALWAYS GET EMAILS REVIEWED BY SOMEONE ELSE ON YOUR TEAM BEFORE YOU SEND IT OUT!!

Best Practice: Emails

DOs

- Etiquette
  - Use ‘To’, ‘CC’ and ‘BCC’ appropriately
  - Use appropriate salutations
  - Provide an index for attachments
  - Maintain ‘threads’ by topic
- Others
  - Always respond within 24 hours
  - Use a polite tone in your mail
  - Avoid e-mail wars- use the phone instead
  - Use Subject Lines as Headlines

DONTs

- Use ‘Reply All’ every time
- Use ‘Indian English’ e.g. ‘I will do the needful’, ‘out of station’
- Use e-mails for confidential information/ messages
- Send an e-mail when you are angry !
- Send out large attachments without first checking with the recipient
- Type your message in ALL CAPITALS

Best Practice: Standard Reports / Presentations

DOs

- Storyboarding: Create a storyboard or 'skeleton ppt' before you fill in the details
- Key Messages : Use slide titles as headlines giving the key take aways
- Customise : Customise ppt for the presentation mode (call vs face to face) and for the audience
- Consistency: Use consistent format for the reports to the extent possible
- Highlight: Highlight just 2-3 key points on a slide / work-sheet
- Information format: Use the right format – e.g., don't use pie chart when you need a bar chart
- Anticipate: Anticipate 1-2 key questions that may be raised for each slide

DONTs

- Don't create complicated slides – they are more difficult to understand and less effective
- Don't have big lists… group thoughts into meaningful buckets
- Don't provide too much detail (You can always have a back slide / sheet to show all the hard work you have done!)
- Don't use multiple fonts / multi-colored backgrounds
- Don't use too much of colour/bold/italics
- Don't use too much of animation/transition

Best Practice: Phone / Conference Calls

DOs

- **Agenda:** Have a well defined agenda for each call, highlighting key points
- **Preparation:** Prepare and sent it at least **1 hour** prior to the call
- **Roles:** Decide roles amongst team members prior to the call
- **Summarize:** Summarize the key next steps and responsibilities at the end of each call
- **Timing**: Finish 5 minutes before time… Clients will have back to back meetings
- **Minutes:** Make well-defined minutes of meeting (using standardized template) at the end of EVERY conference call
- **Listening:** Listening skills play an important role in communication

DONTs

- Unscheduled calls: Minimize need for unscheduled calls – **the number of unscheduled calls reflects poor client management**
- Don’t join the call “just” 3 minutes late – Join 2 minutes before schedule if possible
- Don’t overshoot the call timings – some key folks may not be available beyond scheduled time. If you need more time set up a follow up call

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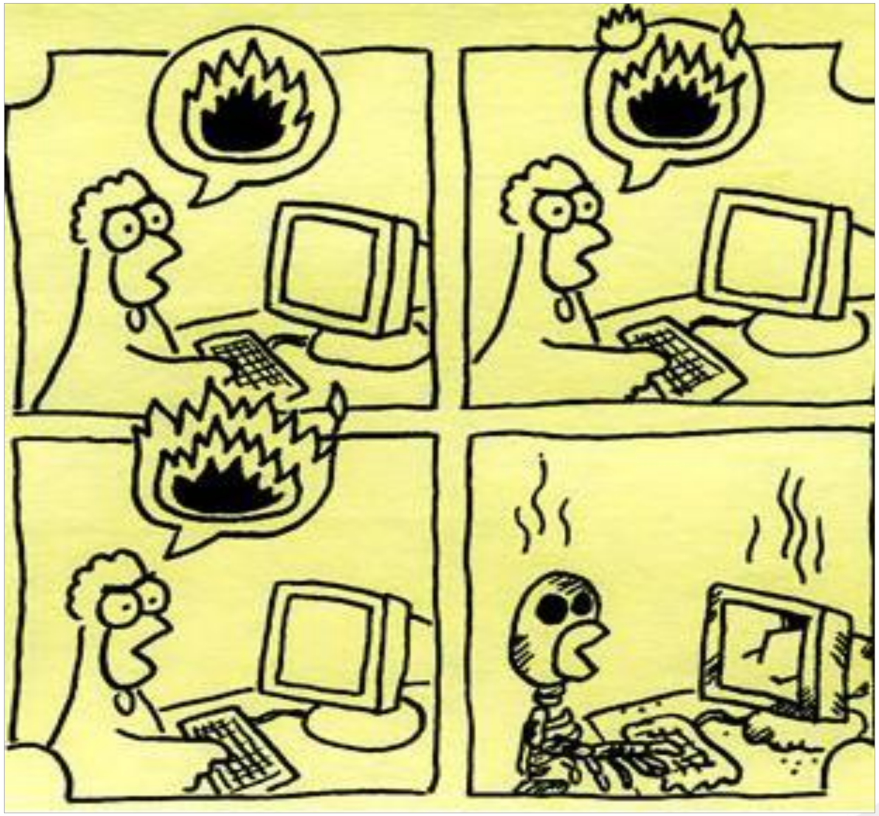
Managing Client Dissatisfaction

- Client communication regarding dissatisfaction needs to be handled with utmost care and urgency

- Clients may express dissatisfaction on email or on the phone



Managing Client Dissatisfaction: On Email

WHILE ON PHONE

- Meet the PL & DL to discuss the issue
- Send email to request a follow up call to discuss the issue
- Along with the DL, prepare the follow up presentation with 4 key slides
  - Summary of issues
  - Key Reasons / Drivers
  - Next Steps for CitiusTech
  - Help needed from Client

FOLLOW UP CALL WITH THE CLIENT

- Walk client through the presentation
- Ask for feedback and agree on next steps
- Let Client know that their feedback is very important to us and we will work on it on a priority basis

NEVER REPLY TO AN EMAIL WITHOUT DISCUSSING IT WITH THE DL!!

Managing Client Dissatisfaction: On Phone

WHILE ON PHONE

- Let client speak – listen very carefully
- Summarize in your own words …"So if I understand correctly, you are unhappy with 3 things … a) … b)… c)…"
- Thank the client for his / her feedback and promise to get back in 1 day with the next steps (unless its really urgent and needs action on the same day)

AFTER THE CALL

- Meet the PL & DL to discuss the issue
- Send email to set up follow up call
- Prepare the follow up presentation with 4 key slides:
  - Summary of issues
  - Key Reasons / Drivers
  - Next Steps for CitiusTech
  - Help needed from Client

FOLLOW UP CALL

- Walk client through the presentation
- Ask for feedback and agree on next steps
- Let Client know that their feedback is very important to us and we will work on it on a priority basis

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Potential Client Scenarios

- How will you communicate to the client and who will own the communication?
  - Attrition
  - Performance issues with team member/s
  - Unplanned leave
  - Planned leave for a week or more
  - Unable to meet project deadline

Potential Client Scenarios – Proposed Approach (1/2)

Scenario	Owner	Proposed Communication	Rationale
Attrition	DL	▪ Verbal – need based phone call (1-to-1 with client manager) ▪ Follow by brief email summarizing the discussion (Written – text)	Communicate bad news in person, in an appropriate manner – discuss and resolve key client concerns, and avoid long email communication later
Performance issues with team member/s	DL	▪ Acknowledge concern (on phone, email) and request for 1-to-1 call with client manager. ▪ Follow up with clear plan / next steps on email to summarize the discussion	Understand nature of issue and gravity of dissat on phone. Use call to share thoughts and exchange ideas for resolving issue. Follow up email ensures that both sides know what to expect and review progress subsequently
Unplanned leave	DL/PL	▪ Either 1-to-1 call (critical issue) or email (less critical issue)	If impact of unplanned leave is not too much, sending a polite email may suffice, else do 1-to-1 call first

Potential Client Scenarios – Proposed Approach (2/2)

Scenario	Owner	Proposed Communication	Rationale
Planned leave for a week or more	PL	▪ Verbal – scheduled conference call ▪ Follow up brief text email or have a standard email format	Planned leave should be communicated well in advance thru weekly dashboards. Two weeks before planned leave, discuss the upcoming leave on the phone and follow up with an email
Unable to meet project deadline	PL/ Scrum Master	▪ Verbal – need based phone call followed by Written – text and Written – standard report	Understand the percentage of work that cannot be completed. Use call to share thoughts/suggestions to mitigate the impact. Follow up with an email and update the report to include action items/owner/next steps

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THANK YOU