CitiusTech: Effective Client Relationship Management

July 2012

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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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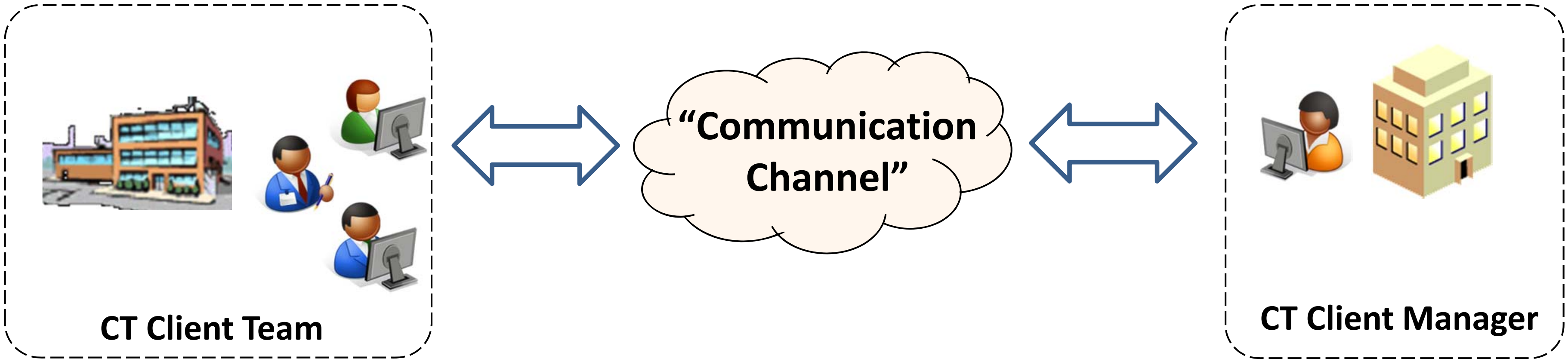
Client Communication Frameworks



- **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 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 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%

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Client Communication: Best Practices

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

Best Practice: Emails

DOs

- Use simple English
- Use sections/ grouping of thoughts
- Use bullet points and numbering rather than big paragraphs
- Define clear NEXT STEPS… with clear "Leads" and "Due Date'
- SPELL CHECK for EVERY message – spelling errors give a poor impression

DONTs

- Provide too much detail - esp. not relevant to the key issue(s)
- Multiple fonts / multi-colored backgrounds
- Use jargon or slang
- Inconsistent greeting / signature
- Example **APPENDIX 2**

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

Impact of a Great Email ☺

"How wonderful! We've just received email from everyone in India!"

Not sure if this cartoon is representing the title of the slide

Best Practice: Standard Reports / Presentations

Dos

- Consistency: Use consistent format for the reports to the extent possible
- Simple: Don't provide too much information on 1 page
- 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 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

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
- **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

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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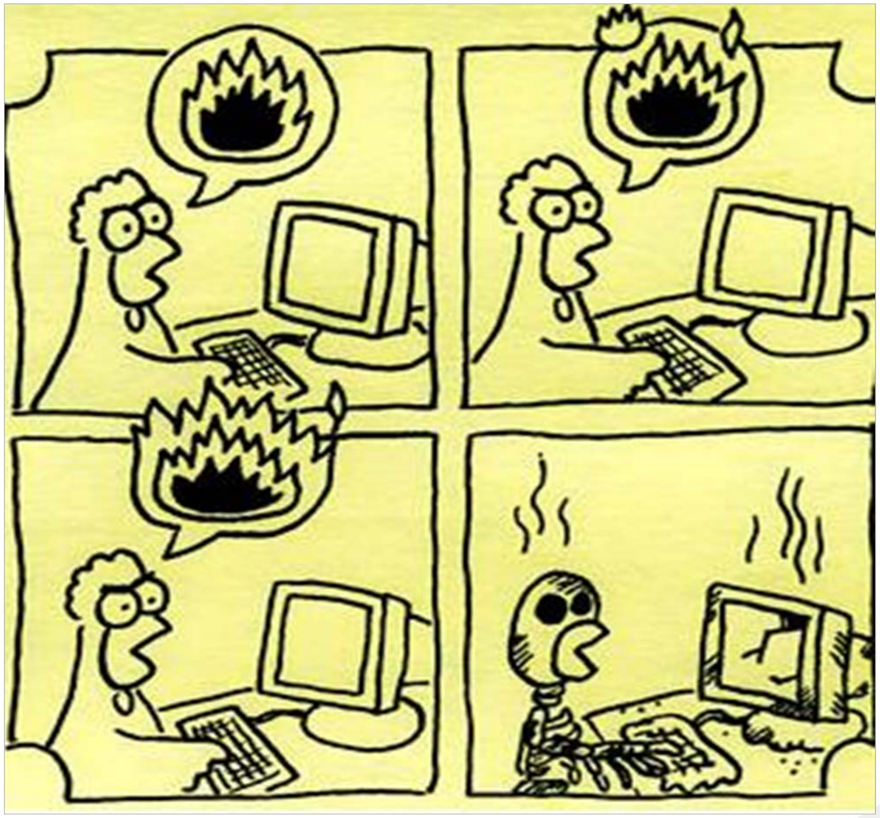
Managing Client Dissatisfaction

- 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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THANK YOU