



THE INFLUENCE BUSINESS

Raise your level of influence

CLIENT RELATIONSHIP MANAGEMENT (CRM) WORKSHOP

Overview

The half day CRM workshop for 10/12 attendees is highly interactive. It outlines the targeting life cycle and maturity stages providers need to progress through (from a cold target to a client that sees them as an advisor to trust). Skills topics are introduced, discussed and demonstrated as the maturity stages progress. These include networking skills to break into new clients; meeting skills to improve relationships and leadership skills to project authority and gravitas.

Live targets are discussed and developed during the workshop. Action plans are prepared with responsibilities and deadlines identified.

The approach participants take is continually evaluated and alternative solutions to difficult situations are presented. Real examples are introduced and the skills and techniques necessary are considered. The focus is always on how participants and their firm can differentiate themselves when seeking more work.

The skills and techniques discussed in the workshop are also relevant to many types of client contact where attendees are seeking to promote themselves or their firm.

Aim

To increase sales to existing clients and bring new clients on board. Also, to help attendees differentiate their proposition effectively from those of the competition.

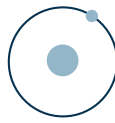
Outcomes

Attendees leave the workshop with confidence to approach targeting from a position of knowledge in that they understand:

- The targeting life cycle from cold clients to mature clients
- How clients decide which firms to work with
- Barriers to targeting and solutions
- How to differentiate themselves and their firm
- The opportunities to influence clients through effective networking, meeting skills and leadership of clients and teams.

Methodology

Our coaches provide an effective blend of BD experience and significant skills knowledge. Our BD coach is ex Head of Proposals for KPMG Europe and he brings his experience to this workshop. Our skills coach brings significant experience of developing the skills of partners at top law firms. The workshop is divided into modules and covers the key stages of targeting and the skills necessary to develop those targets.



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Outline Programme

Introduction:

- Objective setting
- Discussion on targeting life cycle from cold target to mature client

How clients decide:

- Formal/informal decision factors and when to apply them

Barriers to targeting:

- Discussion on barriers and solutions

Networking skills with practical examples

Targeting break out (group work)

- Groups to identify where their target is on the life cycle and the challenges associated with the target
- Consider formal/informal decision factors and progress

Break

Meeting skills with examples

Targeting group discussion:

- Each group to identify position, challenges and progress
- Other groups to offer opinion and challenges

Leadership skills with examples

Targeting group discussion:

- Prepare action plans/responsibilities/actions/what is success and stretch success
- Each group to summarise feedback

Summary and close