



Client Relationship Programme for Professional Services

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The growing challenge

For years, senior level partners have been telling us that they wish that their client facing teams could:

have more impact with clients through having wider and deeper conversations covering all aspects of the client's business or life

build stronger client relationships underpinned by trust

be more proactive in identifying potential client service opportunities to help clients overcome challenges, maximise opportunities and achieve their goals

This has always been seen as a 'nice to have'. Now many firms are realising that this is imperative. A business priority. Because... **The Landscape is shifting**

With technology and AI development accelerating...

and delivering relevant, real time information and computations to clients, most leaders in Professional Services firms accept that there will be a fundamental impact on their value proposition, delivery models and people roles.

It is recognised that so many clients will be looking to their professional contacts to add value in a different way. To contextualise the 'service' (advice, computations, information and data) in respect of the clients world, their business, their environment, their lives. To guide, challenge and support them in making the right decisions in line with their strategic goals and ambitions.

Looking ahead

The future value proposition...

will be linked to the strength and depth of relationships with clients, market and sector expertise, quality of network, the quality of conversations with clients and the quality of opinion and advice.



Many clients will be looking for their professional contact to not just be there FOR them, but to be there WITH them.

Some professionals already possess the confidence and skills to make this transition. A few have already decided to establish themselves as a trusted advisor. However, so many professionals will need support in developing the behaviours, mindset and skills to adapt.

The Accelerator programme

We have successfully delivered Client relationship and Advisor development programmes for domestic and international clients, networks and associations.

Our four or five half-day modular programme covers the key skills and behaviours required to have more impactful client interactions. It includes tools, frameworks and resources that enable practical application of learning. Delegates can take action and make progress immediately.

The programme includes two virtual check-ins at the mid-point and post modules, to create accountability for taking action, to share progress and maintain momentum.



The Accelerator programme



MODULE 1: CONTEXT & CATALYST

- The future
- The start point: setting objectives and outcomes
- Addressing barriers
- Creating space to follow through with action

MODULE 2: RELATIONSHIP MAGIC

- Accelerating the trust building process with clients
- Adapting communication styles
- Active listening
- Client relationship mapping

VIRTUAL CHECK-IN

MODULE 3: 'IT'S ALL ABOUT THE CLIENTS'

- The power of curiosity
- Thinking and planning from the clients' perspective
- Developing great questions to challenge thinking, to draw out challenges and identify opportunities

MODULE 4: THE COMMERCIALS

- What is the commercial model?
- Being confident in your value
- Understanding why clients buy: intangible needs
- Creating clarity – help clients see what they pay for
- Pricing strategies and options

VIRTUAL CHECK-IN

MODULE 5: BRINGING IT TOGETHER

- Embedding learning through practice
- Running 'non-agenda' client meetings
- Real time feedback
- Action plan

Optional module

The Accelerator programme



Resources and takeaways

- Action plans from every module
- Personal value plan toolkit
- Communications style report
- Client showcase templates
- Tips on taking action and embedding learning
- Examples of pricing options
- Relationship mapping templates
- Client showcasing templates
- Question bank: 100+ questions on all aspects of client strategy and operations



What difference does it make?

As a result of attending the programme and taking action, delegates are more confident in building stronger client relationships, having more impact with clients, are able to have more effective conversations to create client service opportunities and proactively help clients deal with challenges.

What next?

If you would like to strengthen your teams' relationships with clients so that they deliver excellent service, retain key clients and create further fee opportunities then please get in touch to learn how this programme can equip your client facing teams with the tools and skills to help them succeed.

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