Client Relationship Management Strategy

1. Research Client:

Where applicable look at the Client's website or on our CRM Tracker to find out exactly what they do and how they are structured. Match what they do to the services that we can offer.

2. Identify Contact:

Identify the points of contact within the organisation who is able to make decisions.

Review all open BQs.

Internal Review Meeting.

3. Arrange Meeting:

Arrange a meeting with the point of contact and confirm in writing the date and time of the meeting.

4. Forward Agenda:

Forward an Agenda to the Client Contact which outlines what you are going to discuss in the meeting and any information which will be required e.g. copy of Health and Safety policy.

5. Ascertain Key Information:

During the course of the meeting explain all OHS services and ask the key questions that will help identify which services we can offer. Identify timescales, areas of risk and the purchasing process.

6. Meeting Minutes and CRM Update:

Ensure that notes from the meeting are produced which record all essential issues of the meeting and that all actions are carried out. Update Tracker with information from meeting.

1 2 3 4 5 6

If proposal declined

7. Forward Proposal to Client:

Produce and forward (face to face where possible) proposal to Client for their consideration within 1 working day of meeting. Submit full costings and implementation programme.
Note: Send with OHS T's and C's. If work is outside the scope of the OHS T's and C's liaise with Director.

8. Follow up proposal:

Follow up the solution within 3 working days of being sent to the Client. If the Client declines the proposal find out why - you may be able to remedy the situation.
Advise Client Relationship Manager immediately of the Client's response. Update CRM Tracker database.

9. Authorisation Procedure:

Upon receipt of order ensure that the relevant IP form (along with any additional information required) is submitted for authorisation. The project will need to be authorised by:

- Credit Control
- Resource Manager

10. Advise Client of Project Milestones:

On receipt of Client Instructions advise the Client when work will start and finish. If there are any changes inform the Client immediately.

11. Follow up Meeting:

Arrange for a follow up meeting within 5 working days of completing a project. This will help identify any further works and will allow us to gauge the Client's satisfaction. Ensure that Client Feedback Form is completed.
Arrange a date for a further meeting and update the CRM Tracker system with details.
Seek referrals from client.

7 8 9 10 11