Team Framework

How to set up and run an effective client services team.
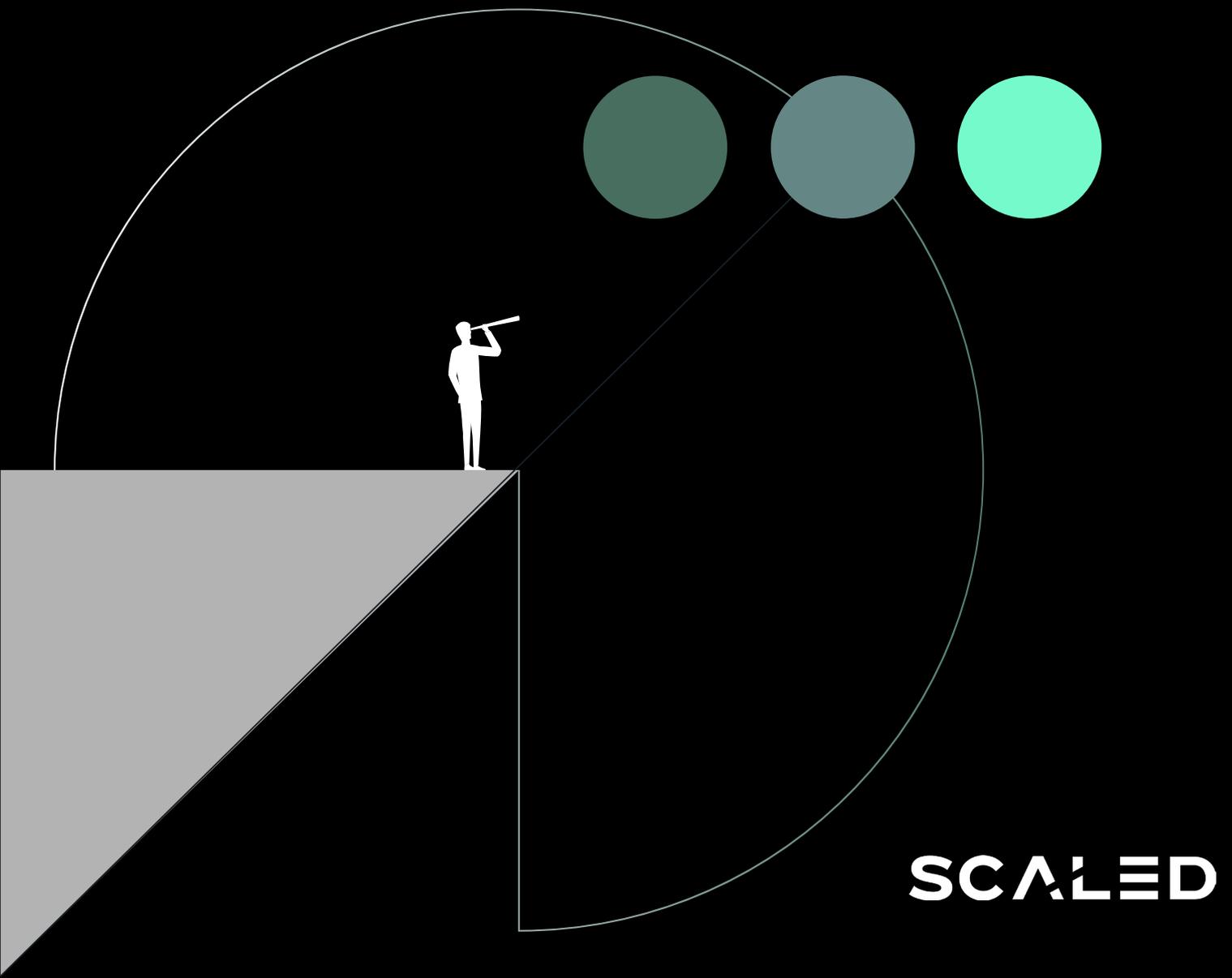
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Table of Contents
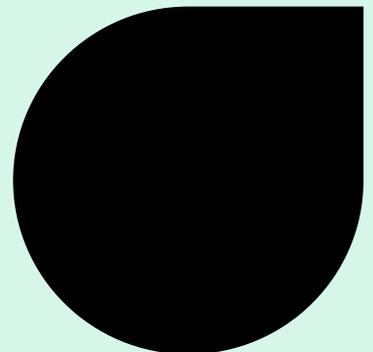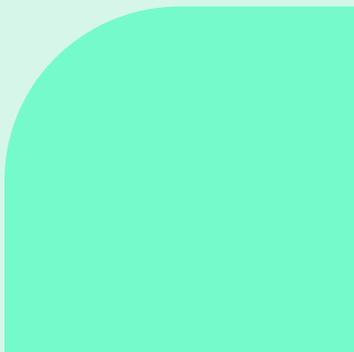
Introduction

This document serves as a framework for setting up, running and managing an effective and efficient CS team covering everything from:

01 Initial onboarding and set up

02 Reporting, written, face to face and phone comms

03 Commercial target setting, tracking and discovery

04 Other admin

05 Team set up

01

Initial onboarding and set up

'Onboarding' covers the phase from first contact through the entire set up and 'get to know your customer' piece to day to day CS delivery.

Pitch Involvement

Often overlooked but CS should be consulted at the earliest opportunity, from the moment a new lead comes in and passes the 'should we pitch' test.

All new business employees should suggest a 'best fit' for client contact and CS team individual to ensure there is good behavioural fit. It can be helpful to review current relationships in this way also and make changes where relationships are strained simply by lack of connection of character.

CS pricing

All new business proposals should also include pricing for all CS related account management from either a pre-agreed pricing matrix based on a mix of industry/spend/client size and service, or from collaborative pricing while building the costing element at pre- pitch stage.

Pitch attendance

It can pay dividends to then ensure your earmarked CS person then attends the pitch (if face to face and valuable enough) to begin building rapport and show that you have thought about it. They can discuss the CS process as part of the pitch.

Post Winning

As soon as a pitch is won the process into the CS team and the person that will lead their strategy/plan has to be immediate and seamless.

The response during the call or as a response to the email that breaks the good news should include details of what happens next and that it will be led by the Account Manager. This instils confidence at the critical initial phase of contact and while you are still in the period.

Initial intro
Irrespective of whether that is a call or any other form of initial conversation, the new business owner should always follow up with a separate email intro-ing in the AM on email, like this:

Hello Karen,

Thanks for the call earlier. We are obviously over the moon that you're going with us. I've already broken the news to the team via our Big Gong and they are excited to get started!

To ensure the onboarding process is seamless, I want to introduce you immediately to Jody, who will manage your account and be your day-to-day contact point from our side.

She will reach out in reply to this email chain and organise a kick-off session with you, as well as one internally here with the relevant team members from our side. You are welcome to attend the internal one if you wish - it can be a great way to kick off the relationship and put some faces to names.

The critical bit will be the session with you, however, separately as we can then organise your comms plan (how, when, where and why you want us to share updates, reports, and so on) - so please let us know what day works for you in the next week or so.

In the meantime, Jodie will set up our standard agreement and send a draft copy over to you for your perusal and comments. This way we can get the boring but important paperwork completed whilst focusing on the key bit.

Thanks again - we can't wait to get started!

Regards,

Keith Richards
New Business Executive
076535 4252637

Onboarding, Finance and Contracts

With initial contact made with the client post win via a call and then the follow up email above, the AM should then respond quickly with an email sharing:

01

A draft copy of the contract/SLA/project agreement.

02

Onboarding form.

03

Any finance form required to set up invoicing etc.

The email explaining these should run along the lines of (for a decent sized win):

Hello Karen,

Great to hear you're going to be working with us! We loved every moment of the pitch process and it was good to put a face to a name during the session last week. As explained by Keith and to you in the pitch itself I'm going to be your point of contact moving forwards for reporting/comms etc. The team will, of course, be available but my job is to ensure you get what you want, when you want it.

To that end I want to tackle two key strands concurrently now to ensure we get the boring stuff out the way so we can start the important work come 1st April. They are:

1. Contract - I attach a draft copy of our standard agreement. It's very simple and straightforward but if you want to look over it and come back with questions or comments we can get the admin out of the way asap.
2. Our onboarding and finance forms - these are useful to ensure we capture all the important details now - so no one has to ask twice!

If you could fill these in and send them back to me please that would be ace!

Alongside this we'd like to set up an onboarding session here at our offices if possible. The reason for this is that there is no better way to get to know the team who will be working on your account - and for them to get an understanding of you, your team and the business. If this is not possible and you'd like us to come to you, or to do a call, then we get it but it would be preferable.

In that session we can agree comms, reporting and present our initial view on strategy for your input. We can then very quickly afterwards produce the finalised version for sign off and get moving.

If you can throw a few dates at us we will do our best to fit around you.

Once again thanks for partnering with us and here's to a successful next few months!

Kind regards,

Jody Braithwaite
Senior account manager

The email will allow you to organise contracts, collate all the important info via the onboarding and finance forms but also set minds on the onboarding meeting. Let's cover each of these in turn.

1. Onboarding Forms (see associated templates)

This form is the basis for all comms and strategy work. It captures everything from the basics of company domain and contacts to company history, objectives and competitors. These should be shared across all team members working on the account to ensure all are on the same page. It also proves useful for building the upsell/cross sell plan (a subject that requires covering in phase two). A brief form replaces this for project work.

It also, importantly, includes terms and conditions/SLA to make clear from the beginning expectations around turnaround and sign off, working hours, response times and so on.
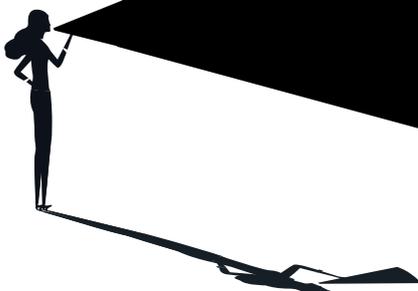
2. Finance Form

Simple but effective way of getting all the details for set up on invoicing system.

3. Contract

ALL work should involve some kind of paper trail. This ensures that the brief is clear, and you avoid any 'grey'. Often relationships fall down if there is no written objective or plan for all to refer to.

Internal Onboarding

Prior to any client meet it is also imperative that the process includes an internal onboard. This is where the team comes together, led by the lead salesperson who won the client, to hear from their mouth what they pitched (often a run through of the deck is important). In it the team is chosen to work on the client, and everyone is brought up to speed ahead of the client meet.
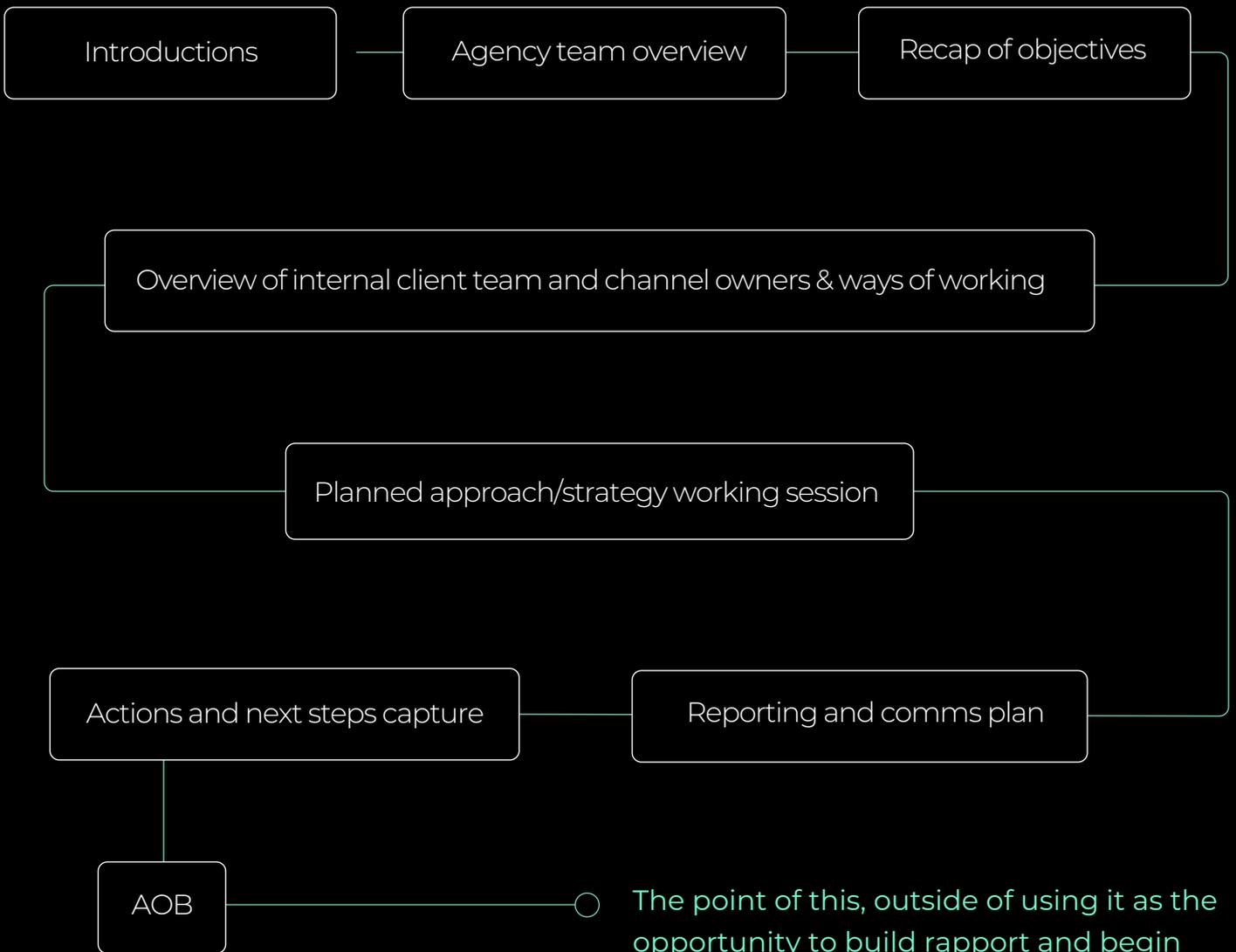
Initial Onboarding
Meet or Call

If the win is a project, or small retainer then this process can be carried out via calls or video conference. If not, then face-to-face is important and you should decide at what level it becomes a prerequisite to meet.

Wherever possible you should request the client comes to you – so they buy into the whole team and business. Where not possible you go to them.

Ensure you have an agenda before you go in too that looks a little like this:

On-Boarding Agenda

Introductions — Agency team overview — Recap of objectives

Overview of internal client team and channel owners & ways of working

Planned approach/strategy working session

Actions and next steps capture — Reporting and comms plan

AOB

The point of this, outside of using it as the opportunity to build rapport and begin the relationship creation process, is to achieve agreement on ways of working, communication plan and reporting.

Doing this face-to-face means you are all on the same page and everyone comes out of the session fired up for action. The AM leads the session and captures all actions – which are shared on email following the meet.

Onboarding form

02

Reporting, written, face to face and phone comms

Once onboarded and with delivery rolling out it is important to have a solid reporting and comms strategy in place to ensure clarity of information.

Reporting Set Up

As part of the onboarding session you should agree the format of reporting – and frequency. Clearly there should be a pre-agreed matrix internally for this based on spend levels. To create yours you can either use your own metrics, or base it on something like:

Retained

£0 – £1000 per month
Monthly report and call.

£1,001 - £1,500 per month
Monthly report and fortnightly call.

£1,500 - £3,000 per month
Access to Live Dashboard, monthly reports and weekly calls

£3,001 - £6,000 per month
Live Dashboard, weekly calls and reports.

£6,000+
Bespoke based on what they want.

Project

0 - £5,000
Initial call and set up and then report at the end.

**£5,000 - £10,000**
Weekly Call.

£10,000+
Bespoke

Reporting set up

As part of the on-boarding you will have discussed, and agreed, what is possible to track based on their spend level.

There is then a wider discussion to have about the mechanism you use for reporting. Ideally you will have access to live reporting dashboards which you can share clients into.

These can be easily built in Google Data Studio: *Example 1*

Top Level Performance

Sent	Opened	Open Rate	Replied
17,805	11,293	44.5	145
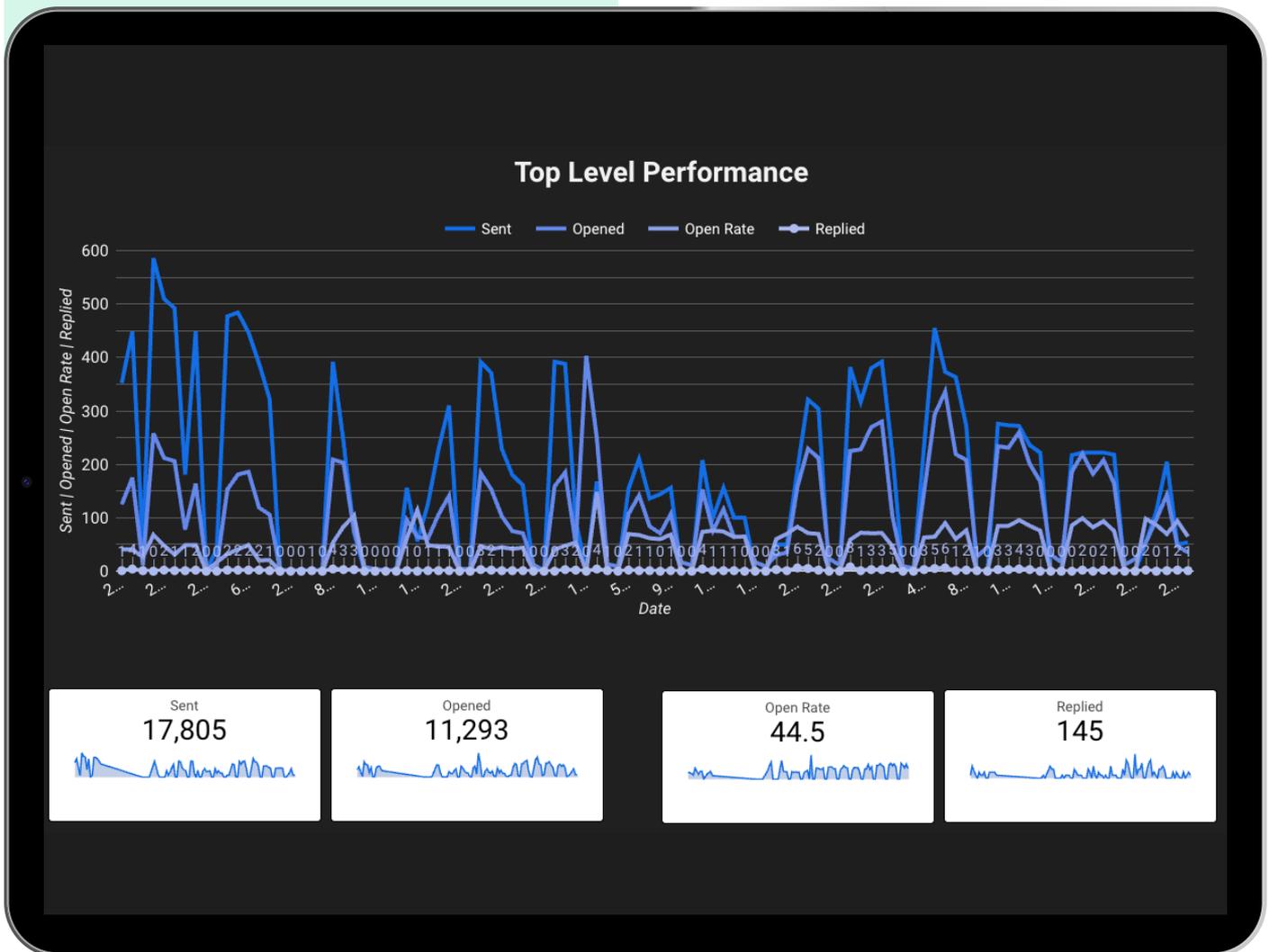
With a small area for commentary built into these they can easily be used as part of the monthly reporting process.

Activity Reporting

As part of that dashboard it can also be helpful; to add in an 'activity/progress dashboard.

Link Building			
Date	**Domain**	**Link Type**	**Status**
2025-05-28	exampledomain.com	Guest Post	Completed
2025-05-24	outreachsite.org	Niche Edit	Completed
2025-05-22	blogspotnews.net	Resource Page	In Progress

Latest links

Date	Anchor Text	URL	Domain Authority
2025-05-28	organic skincare	View Link	52
2025-05-24	eco beauty tips	View Link	47

Content creation			
Date	**Title**	**Type**	**Status**
2025-05-27	"10 Benefits of Organic Serums"	Blog Article	Published
2025-05-26	"Summer Skincare Trends [Infogra	Visual Asset	Editing
2025-05-25	"Brand Story for Homepage"	Web Copy	In Review

Latest content

Date	Title	URL	Word Count
2025-05-27	"10 Benefits of Organic Serums"	Read Now	1,050

Website recommendations

Website Health Score

86%

URL	Issue	Suggested Action
/blog/skin-guide	No category assigned	Assign to "Skincare"
/news/2024-produc	Uncategorized archive post	Tag as "Product News"
/offers/may-special	Category missing in metadata	Assign to "Promotions"
/article/guest-contr	No parent category	Assign to "Contributors"
/resources/downlo:	File not categorized on upload	Tag under "Resources"

This sits neatly alongside the performance reporting dashboard to give clients a real time view of what has been completed from the monthly plan.

This can be helpful in keeping comms open at all times and to help reduce questions on calls.

Comms Planning

Good communication solves all problems and, within reason, the more you can do with clients the stronger the relationship will be.

A good one should be multi-faceted and agreed up front with all new clients. It should contain:

01

Reporting schedule (see Example 2)

02

Call schedule.

03

Entertainment schedule (internal)

04

Surprise and delight schedule (internal)

05

Upsell/cross sell (separate - see commercial section)

06

Feedback schedule

Calls

Call frequency should be set based on the level of current spend or with a view to the possible lifetime value – or opportunity to grow the account via upsell/cross sell.

You will have been clear about what is included, however. From pitch stage and so by this point the job of the AM is to deliver the framework consistently, after first agreeing timings/days of the week and so on with the client.

These should be added as reoccurring diary entries, complete with call details on them so as not to miss one.

Each call should then be structured to include:

01 Initial catch up and social questions to build rapport.

02 Delivery (day-to-day) questions – covering issues/opportunities and sharing and agreeing challenges with sign-off and so on. Explain what's happening next – and when to expect things. This can also include reporting run throughs if appropriate.
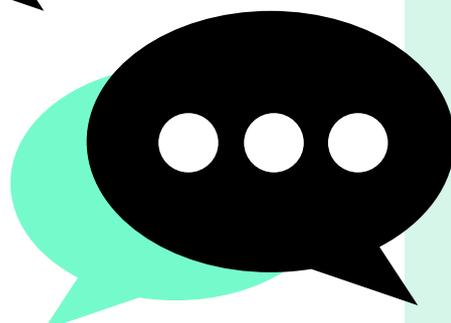
03 Strategy questions – Is the strategy still right? Has it been, or does it need, updating? When is the next review?

04 Upsell/Cross sell Commercial – question around how other areas of the business are doing, when budgeting is, how are competitors doing etc in order to obtain info from which you can build upsell/cross sell ideas from. This is NOT sales – more info discovery and consultancy-led value add.

Each call should then be structured to include...

Initial catch up and social questions to build rapport.

Delivery (day to day) questions – covering issues/opportunities and sharing and agreeing challenges with sign off and so on. Explain what's happening next – and when to expect things. This can also include reporting run throughs if appropriate.

Strategy questions – Is the strategy, still right? Has it been, or does it need, updating? When is the next review?

Upsell/Cross sell Commercial – question around how other areas of the business are doing, when budgeting is, how are competitors doing etc in order to obtain info from which you can build upsell/cross sell ideas from. This is NOT sales – more info discovery and consultancy-led value add.

Entertainment

As well as managing day to day effectively and efficiently it is also important to build relationships and trust. Without it accounts simply will not grow.

To do this entertainment and surprise and delight' is used and you should develop an internal calendar to track who, when and where this should be happening.

Again, how much (or indeed if it is done at all) should be based on spend and propensity to spend. If, for instance, you win a Nike project worth £5,000 you may take the view it is worth investing in to grow the account, while if that same project was from an SME you may decide against it. The decision is one based on commercial logic.

Again, it is useful to create a matrix here. Base it on spend and propensity to spend.

Example 1: A large ecommerce brand is spending £2,000 per month on technical SEO only. You decide to allocate a £50 per month budget to entertaining based on the scope to grow.

Example 2: A client that spends £6,000 per month. You allocate a £100 per month entertainment spend as research suggests they want to do a content campaign per quarter at £10k per time.

The budgets can be rolled up into quarterly, or even twice-yearly chunks if you want to do something more extravagant – and the planning (and accountability of utilising it) of this should sit with the account manager.
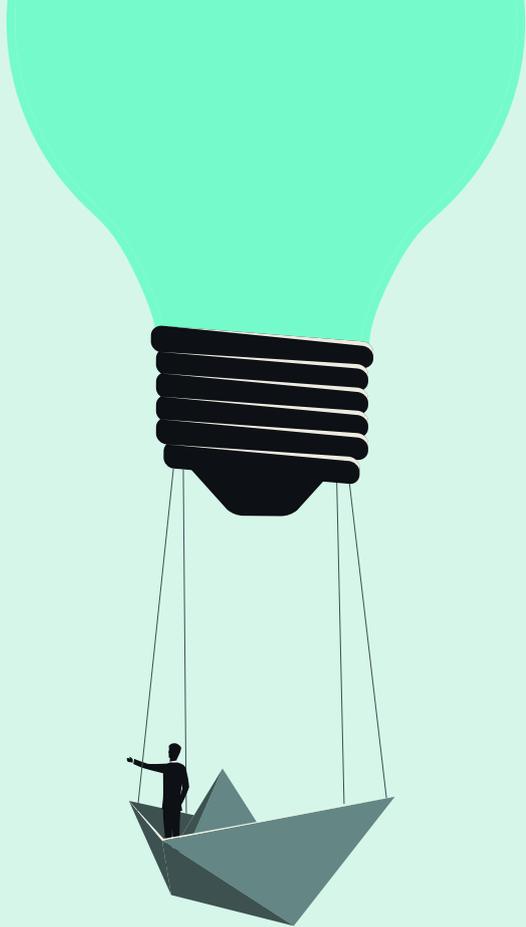
Surprise and Delight

Part of the above plan and budget can and should be 'surprise and delight'- where you create a monthly budget of £50 to spend on any one client the team votes for. The gift should be unexpected and personal to the contact so as to have max impact and value.

Feedback, NPS and checking in

Alongside the more informal strategy should then also be a solid client happiness measurement process. One way of doing this is via the tried-and-tested Net Promoter Score (NPS) process. You can gather this either via a simple google form, or, even better, via a personal call from the senior account sponsor.
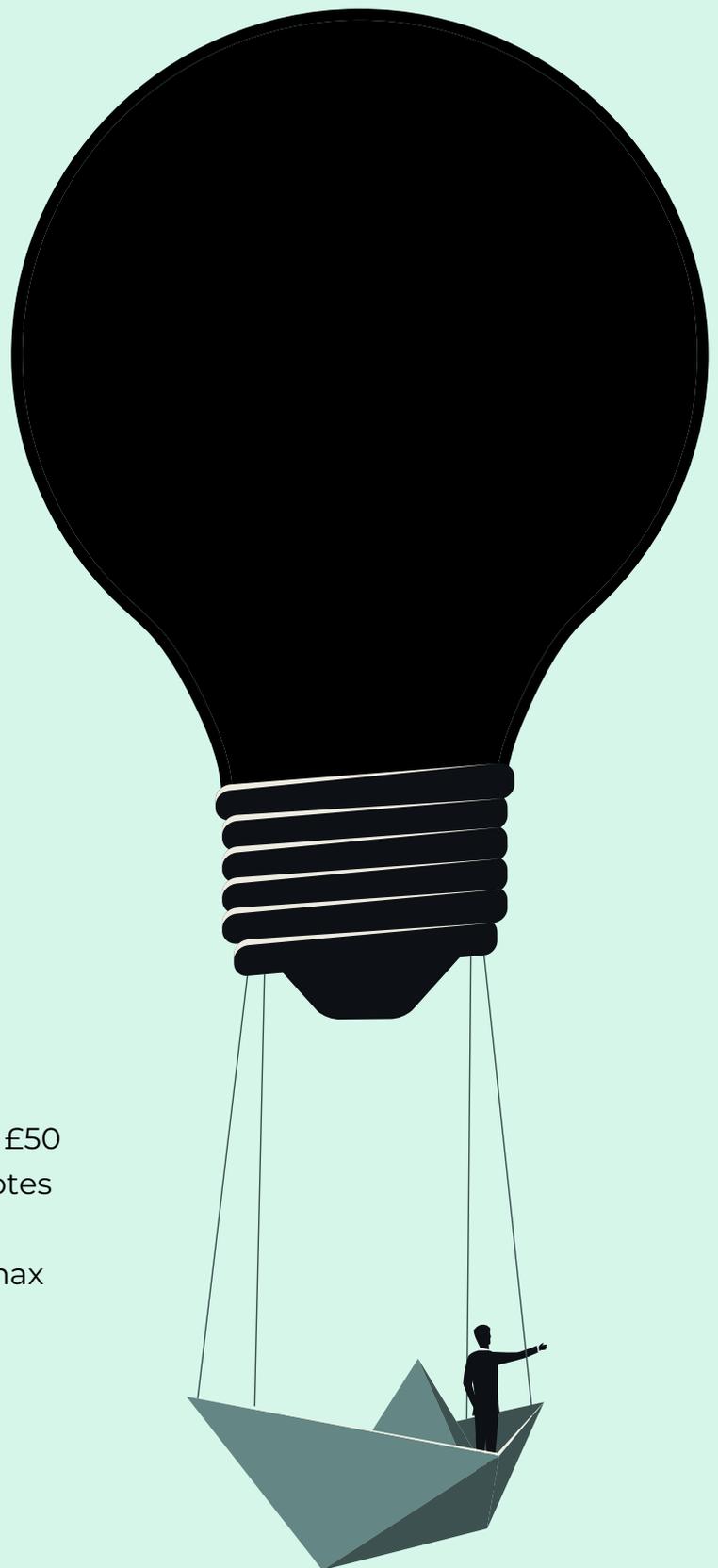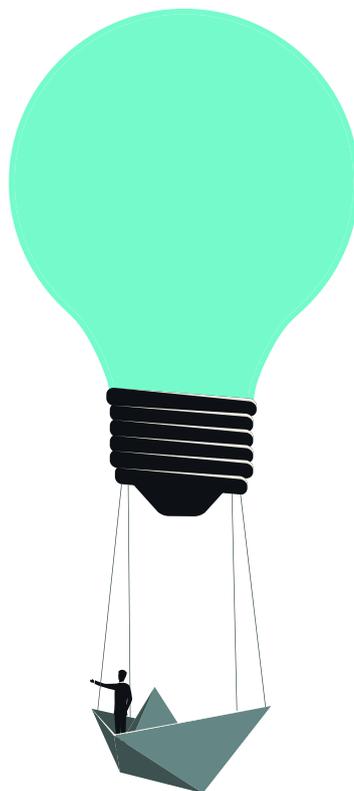
Exec Sponsor/ Senior Account Sponsor

All clients should have an account manager and understand the clear escalation path for them, should they be unhappy about anything. This should be explained to them during onboarding and emailed to them as part of the follow up post your initial on boarding meet.

> The usual course of action for this is: **Account Manager > Head of CS > Exec Sponsor.**

The job of the exec sponsor is to stay out of the day to day nitty gritty and simply act as both a source to escalate to, should the client feel they are frustrated, but also as someone to add value in the entertainment piece.

They should be chosen based on character fit and also to correctly match the size of the client. A large or important client should have one of the most senior members of the team as an exec sponsor, while the smaller clients could have another exec-level employee from another team.

Then the important thing is that the majority of clients have a sponsor and are aware of them and that the sponsor

01 The entertainment plan – attends 'events'

02 The Client Happiness/NPS plan – They are the ones that call the client once a quarter to check in on happiness and score that. They then are also responsible for any actions that come out of that and to raise issues with the CS team.

Flags meetings

Any feedback from weekly calls or comms as well as the exec sponsors should be collated by the head of CS who should then run a Flags session in the weekly meet to highlight client issues and formulate a plan to fix them. Outstanding actions should be the first on the agenda from the last week's meet before new ones are discussed.

03

Commercial target setting, tracking and discovery

Another key task for the ops team is to monitor and track capacity, utilisation and progress and to use this data to inform key decisions such as hiring and firing and freelance resourcing.
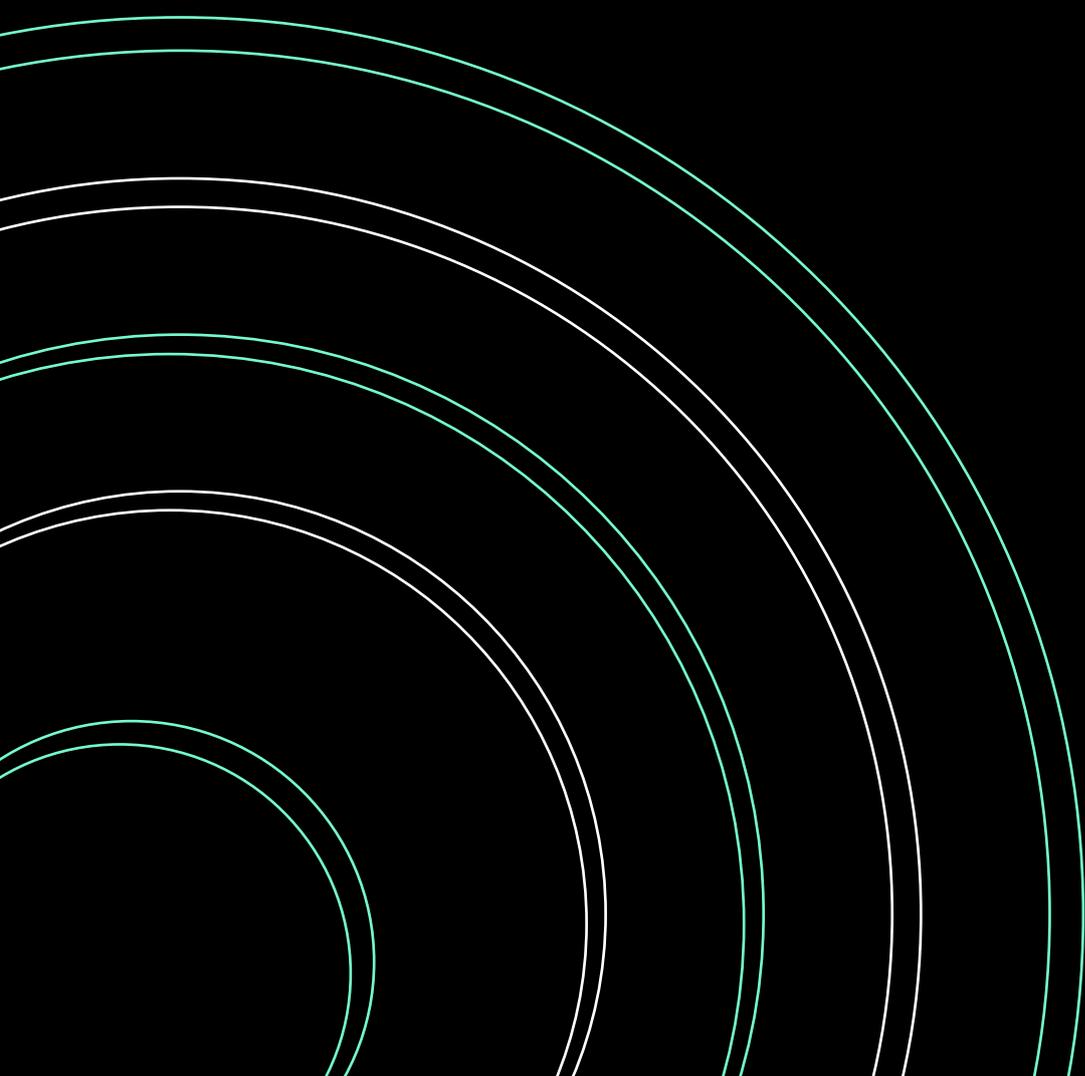
'If you're not selling to your clients then they are a foot closer to the exit.'

It's this mantra that should drive a commercial mindset from within the CS team and while that doesn't mean they are pure sales people the focus should be on building a process – and mindset – that is constantly probing for, listening for and building towards ways to sell more to the existing client base.

Cross and Upsell

The way to achieve this is through either upsell (more of the same – or repeat orders), or cross sell (other services).

Planning

The first stage of this revolves around good planning. As part of the onboarding exercise you should have recorded such things as which channels the client currently operates in (paid search, organic, social etc), who owns those budgets and who currently does that work.

Through relationship building you can also understand whether there is appetite to grow into others (CRM etc), as well as the wider business strategy and its priorities.

This should all be recorded within your CRM and translated into a client review document *(see 'Client Review Template').*

This is designed to be owned by the AM and it gives a top-level view of the client relationship and the opportunities to grow it. It should be updated monthly to give the latest view on relationship and service opportunities. The template can be expanded on a per client basis to include further detail, if needed.

Discovery

To build out that picture we need to first understand as much as we can about the business and individuals within it that own our service area and those related areas that we may wish to expand into via cross sell.

A good relationship with the day to day contact allows this to happen and so the initial focus is on onboarding them well, servicing them brilliantly and building trust via plenty of face-to- face time.

Once this is established you can start asking questions such as these:

01

What does the organisational structure look like around you and who's the main decision maker in marketing/ advertising?

02

Which channels do you currently run activity/budget through?

Who owns each of those?

Is that managed in house or via agencies?

Which ones?

03

How are they performing in each channel?

What are the problem areas right now?

How is each channel doing against KPI?

It is also important to introduce your Exec Sponsor and establish the entertainment plan as part of that process, meeting or taking the client and using it as an excuse to invite their boss also. This starts to establish more and more tentacles into the business, removing the risk of your immediate contact leaving, while allowing the CS team head, or exec sponsor to grow relationships further up the organisation – from where they can help with upsell and cross sell.
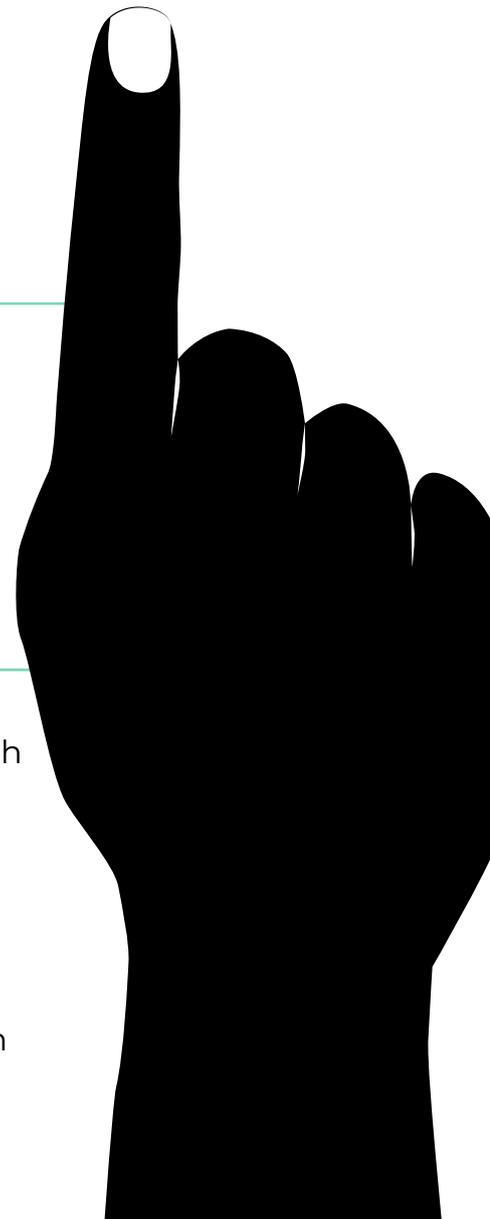
Approach and action

Just asking whether you can 'do more link building' won't get you the results you are looking for either. You need to build trust and then look for ways to add value, while dropping key questions into the ongoing conversation naturally.

The best way to achieve this is to come from a place of being helpful and 'bought in' to their in-house challenge. By putting your head inside theirs and seeing it from their perspective you can often find ways to grow spend as a solution, rather than a sale.

To do this you can **probe for areas of weakness or opportunity** (they are not doing it) or for ways to improve upon what's being done right now.

Once you have the map of who owns what, and who does it, then you can look to **build out a proactive plan** to gather evidence to use a firepower to upsell and cross sell.

To do this your weekly team meet with the rest of the CS team should include an agenda item around upsell/cross sell (see the Day-to-Day section) to agree actions and priorities for the quarter.

From this list it is then easy to **create a number of tasks** for team members to complete that provide the AM with the data and ammunition to sell in your services.

Within the weekly team meeting, the AM should discuss the closest opportunities – such as XYZ Brand are struggling with their PPC performance and we have suggested we can audit their current set up. This should then be tasked through the project management system as a task, just like a normal client task and output sent to the AM to share.

These free audits are a key part of the upsell/cross sell approach.

"You need to build trust and then look for ways to add value…"

Business reviews

Alongside this it is possible to engage more senior stakeholders (often via the exec sponsor) by offering to run a free Opportunity Audit. This document is a more in depth, deep dive that looks more holistically at the business with a view to understanding where the biggest opportunity lies. Occasionally this can be paid work (Digital Consultancy) but if the appetite is there you can do varying degrees of it FOC if your client can guarantee an audience with the CMO/ Marketing Director, or another senior stakeholder.
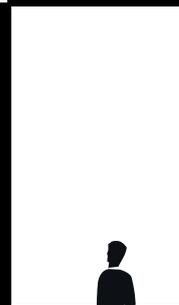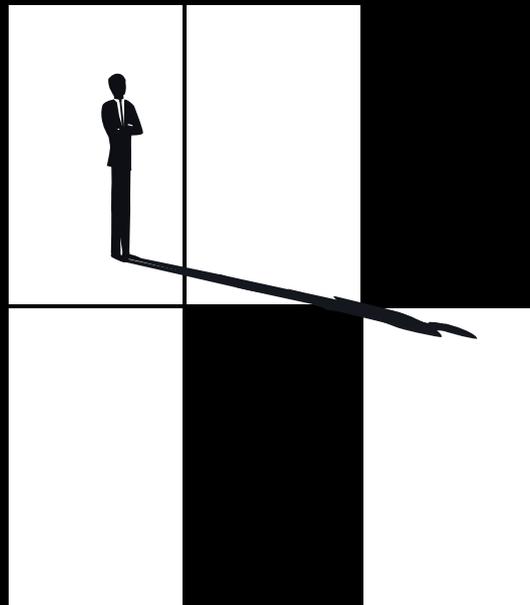
Its output may suggest that they invest more in an underutilised channel, start in a new one or move their agency to you if it discovers serious management issues.

04

Day to day responsibility

Outside of this it is then worth charting the day to day that sits alongside this effort.

Tasks

Daily

1. External Account Management / Client Communications

2. Internal Account Management / Delivery Overview

3. Timesheet Completion & Management

Weekly

1. Weekly Client Reporting (where applicable)

2. Client Flags Completion & Management (Monday AM?)

Monthly

1. Monthly Client Reporting

2. Client Meeting Scheduling, Preparations & Attendance:

   a. Agreeing & Arranging Attendees

   b. Preparing & Agreeing Agenda

   c. Presentation Preparation

   d. Logistics

   e. Drafting, Circulating & Managing Minutes & Actions

3. Strategy management alongside planning attendance and prep

Role Overviews

Below is a summary of the key role definition for the main positions within Client Services:

Account Executive

Predominantly office-based, you will provide additional strength-in- depth across the account management team to ensure maximum administrative efficiency over the lifecycle of all client contracts. Responsible for clear and concise internal communications with, and information from, the contract delivery teams, you will ensure that all client reports are produced and dispatched on time and that the content delivers a compelling and positive message around overall performance at all times. You will also support the management of all weekly activity reports across your portfolio.

Account Manager

An experienced digital marketer, you will support the Account Director on contract performance and delivery. You will be in attendance on all monthly client calls, producing and circulating an Agenda for each in advance, as well as producing, circulating and monitoring all client call & meeting minutes / actions. You will also oversee the consistency, structure and output of all monthly reporting, supplying these to pre-agreed deadlines and will support the Account Director in achieving wider business objectives, producing compelling proposals within tangible propositions and measurable

(and achievable) outputs to drive further success. The management of all weekly activity reports across all client accounts is also a key requirement to ensure all internal and external responsibilities are tracked, recorded and actioned on time by all parties.

Account Director

A senior member of the Client Services team with significant digital marketing experience, responsible for driving account performance and ensuring that any pre-defined KPIs or targets are met as a minimum on an on-going basis. You will attend all quarterly review meetings, taking lead-responsibility for strategic campaign planning & deployment, quickly building rapport and trust across the client's senior management team. The focus for this role is to take a long- term approach to performance and growth, identifying and facilitating up and cross-sells and positioning themselves as an integral member of the clients own marketing team. With a comprehensive knowledge of their clients' wider business objectives, you will continually increase your reach across all clients and regularly facilitate introductions to new members of staff within each account at a senior level.

Please note that these summaries are not an exhaustive list of responsibilities for each role and further duties are outlined within the individual job descriptions and also include additional tasks as requested by the appropriate line manager.

Meetings

Weekly CS Team Meet

Flags, Upsell, Contracts, Entertainment etc.

The weekly CS team meet is the most important to ensure goes ahead. It is led by the head of CS and follows an agenda such as:

01 **Actions** from last week.

02 **Flags** – each AM discusses client issues and agrees actions. Only serious negative points to be included, otherwise this dilutes the impact of those that are serious as there's too much to review and discuss

03 **Contracts** – Review of contracts coming up for renewal and actions to renew.

04 **Entertainment/Surprise** Delight plans for the week/ month

05 **Upsell/Cross sell prioritisation** – work through of the current plan for commercial opportunity and actions set.

Planning

Planning should happen once a month over one or two days. It is led by head of ops and works through client by client to check strategies and push tasks into the project management system for the month based on what the strategy lead for the client has captured. It is a good opportunity for the AM to test and check the validity of the longer-term strategy and adapt based on current performance and feedback.

In it the strategy head and ops head run through the client list and plan client-by-client what the plan for the month is based on pre- existing strategy information but also a discussion with the AM and delivery lead/s for that client.

This is a time intensive process but sets the plan for the month ahead and the head of ops or admin support then inputs every task from that session into the project management system for the teams to then deliver.

Wash Ups

These should happen once a month and cover any significant issues or client losses. It is run by Ops and CS jointly and often will include the MD/head of business.

In it each issue or loss is looked at in detail, talking to anyone involved to understand what can be learned and done differently. Actions are captured by ops and actioned.

Reporting

Reporting is a critical part of the CS process and it varies depending upon a number of factors. I suggest we look at the reporting process in detail, separately, to see if we can improve it as ideally you should work from live client dashboards that give you the ability to add summarising information as regularly as you agree with client.

All Hands

The business should have an 'all hands' session once a week to share the following:

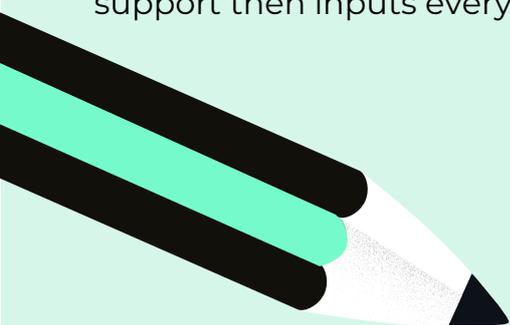**01** **Good news and cultural** stuff such as birthdays/ anniversaries/staff entertainment plans etc.

02 **Key things** New wins/great work/losses/ financials/pitches etc.

03 **Client update** Led by CS. Overview of highlights and lowlights, intro to new clients. Meetings happening next week etc.

04 **Team showcase** Once a month

Client Meetings

The key to running good client meets is preparation. The below is a guide to ensuring that is done well.

A

Communication

Liaise with the client to understand any key points they wish to cover as part of the meeting. Please also ensure that you have some specific points you also wish to address, whether this is performance-related or new ideas to help improve overall performance.

B

Preparing & Agreeing Attendees

This will partly be dictated by the Agenda, though please request other client attendees if you believe their input and involvement will be useful. Liaise with colleagues internally around who should attend, being mindful that CS should try, in the first instance, to cover as much as possible themselves before inviting multiple attendees from across the delivery teams. If you require someone from another department to attend, then please try to give as much notice as possible so that they may undertake any required preparation in advance.

C

Presentation Preparation

Again, this will partly be dictated by the agreed Agenda, though actual current performance should be the main focus. This can include historical trend and / or competitor analysis, along with recommendations as to how to drive improved performance in the future. Whilst part of this will inevitably be backwards looking, there also needs to be a strong focus on future planning and opening up more opportunities for us to support their wider business by truly understanding their wider business challenges and ambitions.

D

Logistics

Once all attendees are confirmed, any travel and / or accommodation requirements should be booked as early as possible in advance to ensure that the best possible rates are sourced, for example, in London. Confirm once these are booked and supply confirmation.

05 Team set up

The organisational structure of the team will vary and continue to iterate as it grows. Below, however, we capture a view on taking the team on a structured growth journey and in a way that creates alignment and clarity.
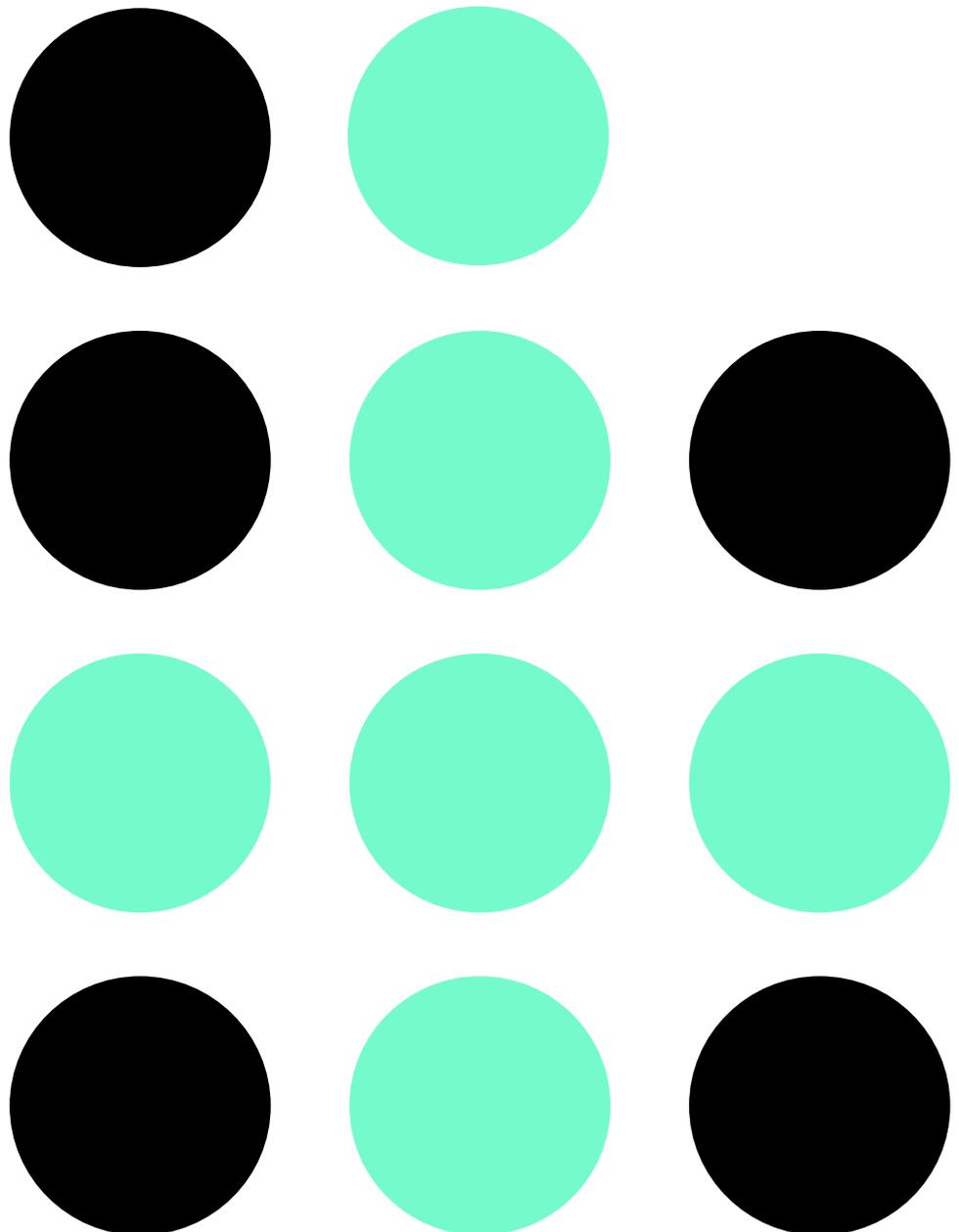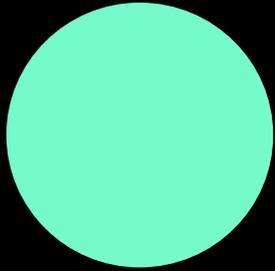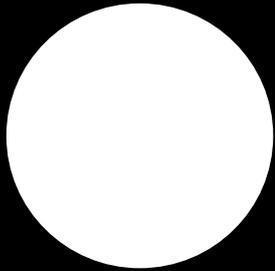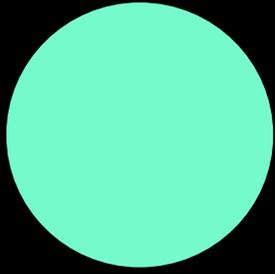
Organisational Structure

While a team is small how it is structured is really quite straightforward. That doesn't mean, however, that you should not create a plan for growth as doing so achieve two things:
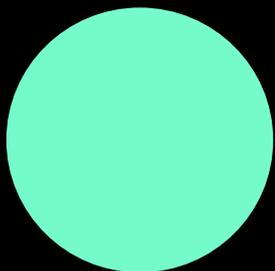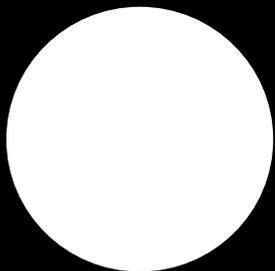
01 It prepares you for that step and ensures clients continue to get the very best levels of support.

02 It provides clarity to those within the team of their career path.

There are two main paths for all teams in a growing team and they require different, but equally important natural skillsets:

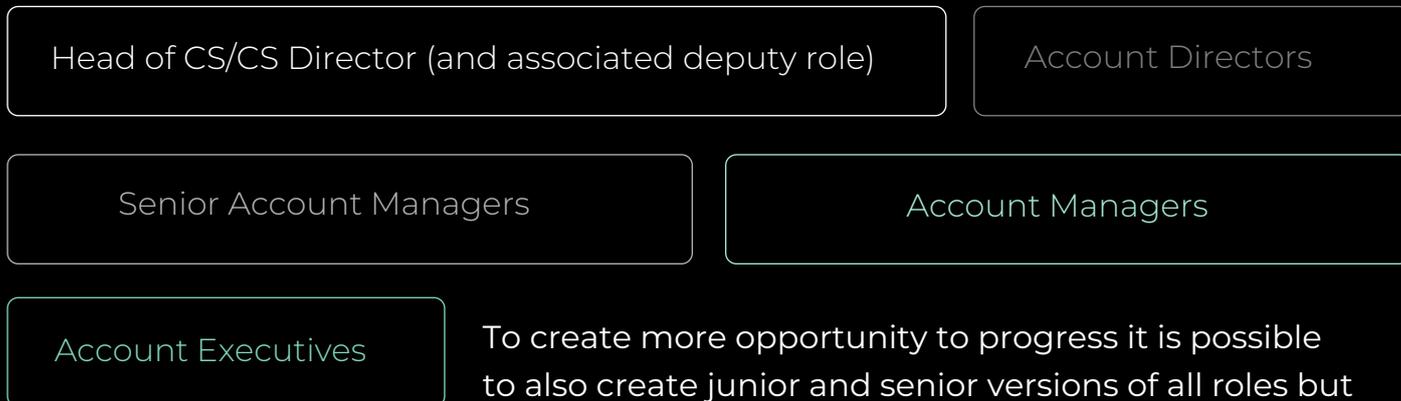**01** Strategic and tactical delivery expertise.

02 People management.

To reflect this, we need to create a two-tiered organisational structure and pathway.

Roles

As the team grows there will be a need for more roles and experience suggests this is one of the best ways to structure:

Head of CS/CS Director (and associated deputy role)

Account Directors

Senior Account Managers

Account Managers

Account Executives

To create more opportunity to progress it is possible to also create junior and senior versions of all roles but for the sake of this process we will focus on the general structure and associated responsibilities and differences.

The diagram below explains how the hierarchy works and what percentage of their role is focused on account management v senior relationships v people management.

Senior relationships, strategy

People management

CSD

HoCS

SAD

CSM

AD

SAM

AM

SAE

AE

Day to day account management
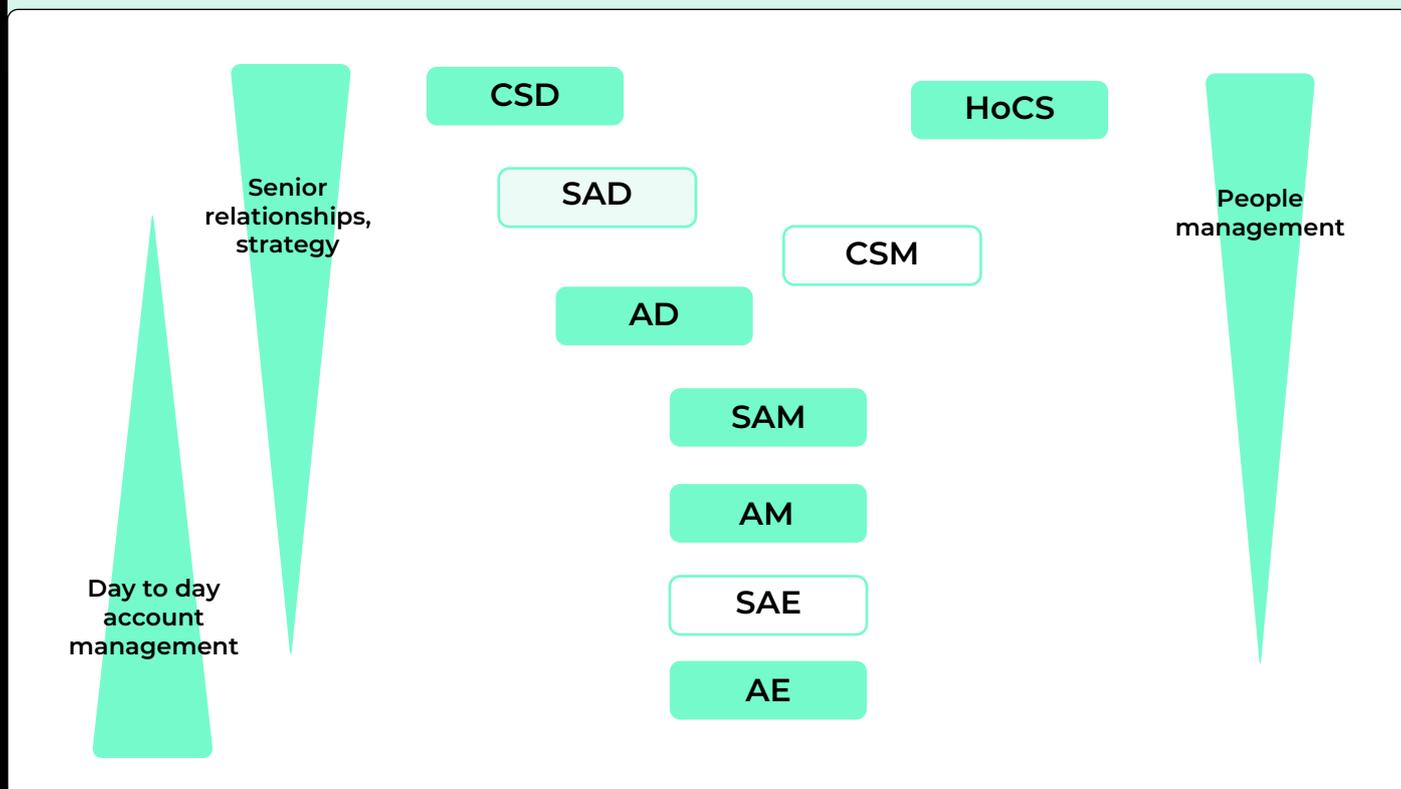
You can see how the client services director/head of focuses on team management and senior client relations but doesn't manage many accounts, whilst at the other end of the spectrum account managers manage accounts full time. Account execs then support with an admin role, freeing up AMs and above to spend as much time as possible talking to, and spending time with, clients.

Key responsibilities are as follows:

01

Account Executive
- Day-to-day comms
- Reporting & admin
- Project lead
- Internal project management

02

Account Manager
- Day-to-day comms
- Reporting & admin
- Internal project management
- Planning lead
- Commercial focus & opportunity
- Client entertainment
- Issue resolution

03

Senior Account Manager
- Day-to-day comms, reporting & admin
- Internal project management
- Commercial focus & opportunity
- Client entertainment
- Issue resolution
- Senior account & strategy leadership
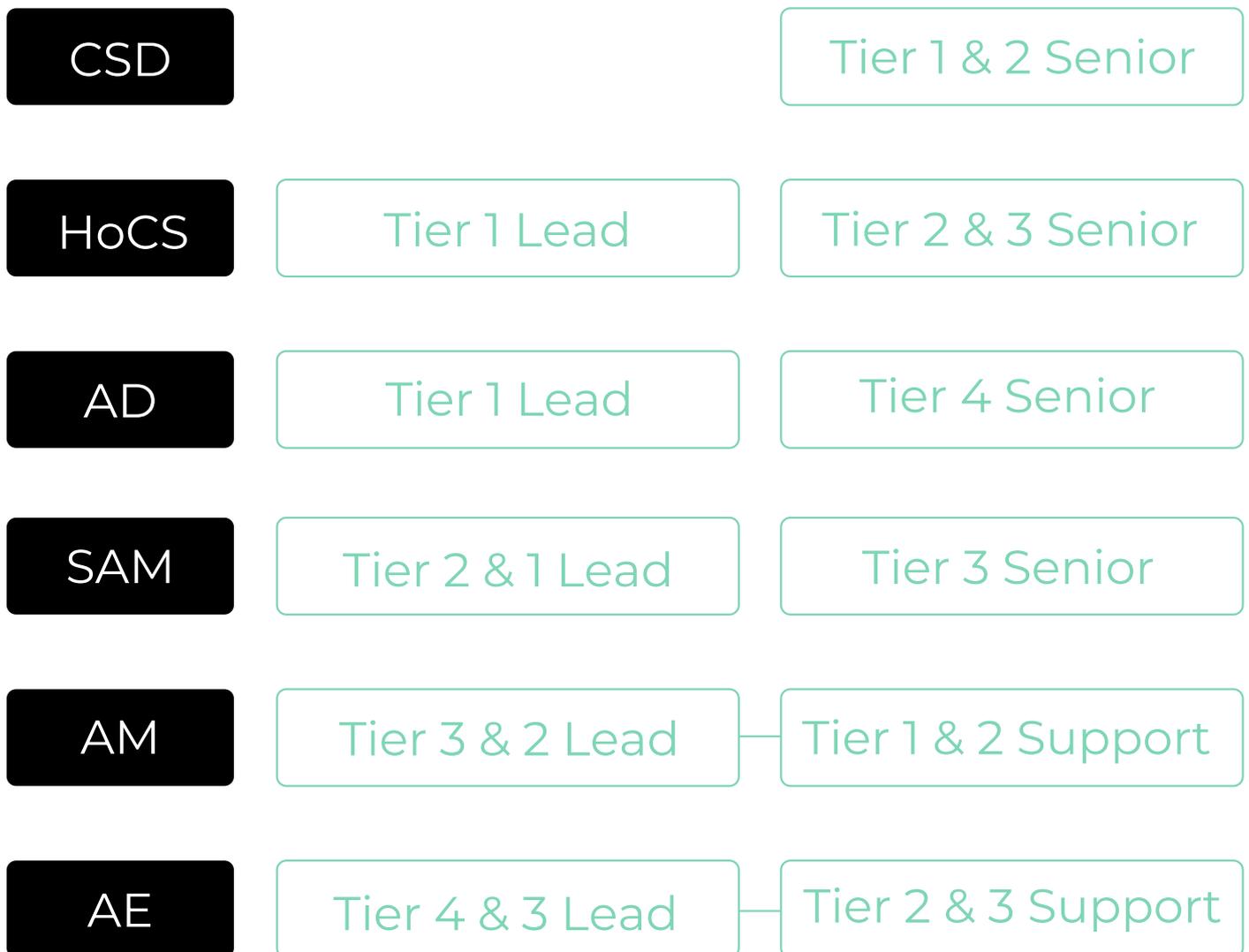- High-level issue resolution
- Pitching

04

Account Director
- Internal project management
- Commercial focus & opportunity
- Client entertainment
- Issue resolution
- Senior account & strategy leadership
- High-level issue resolution (including financial/contract)
- Pitching
- Strategic client comms
- Senior relationship building (Inc. Tier 4)
- Inter-team integration
- Project to retained
- Account senior

Tiering clients

In this model it is also important to tier clients and match them to the appropriate role in the organisation. Below we see how we focus senior time on the biggest clients (Tier One).

CSD		Tier 1 & 2 Senior
HoCS	Tier 1 Lead	Tier 2 & 3 Senior
AD	Tier 1 Lead	Tier 4 Senior
SAM	Tier 2 & 1 Lead	Tier 3 Senior
AM	Tier 3 & 2 Lead	Tier 1 & 2 Support
AE	Tier 4 & 3 Lead	Tier 2 & 3 Support

The tiers are not necessarily set in stone and will evolve as you win larger projects and retainers, but you must set them.

Pathways and PDPS

With the organisational framework set the next phase is to build out the ongoing support structure to ensure that the team have a clear path to progression and know what they are targeted with.

This is all managed from within their PDP (personal development plan) and it is important this captures clear, measurable targets as well as clarity on what happens when they do hit them.
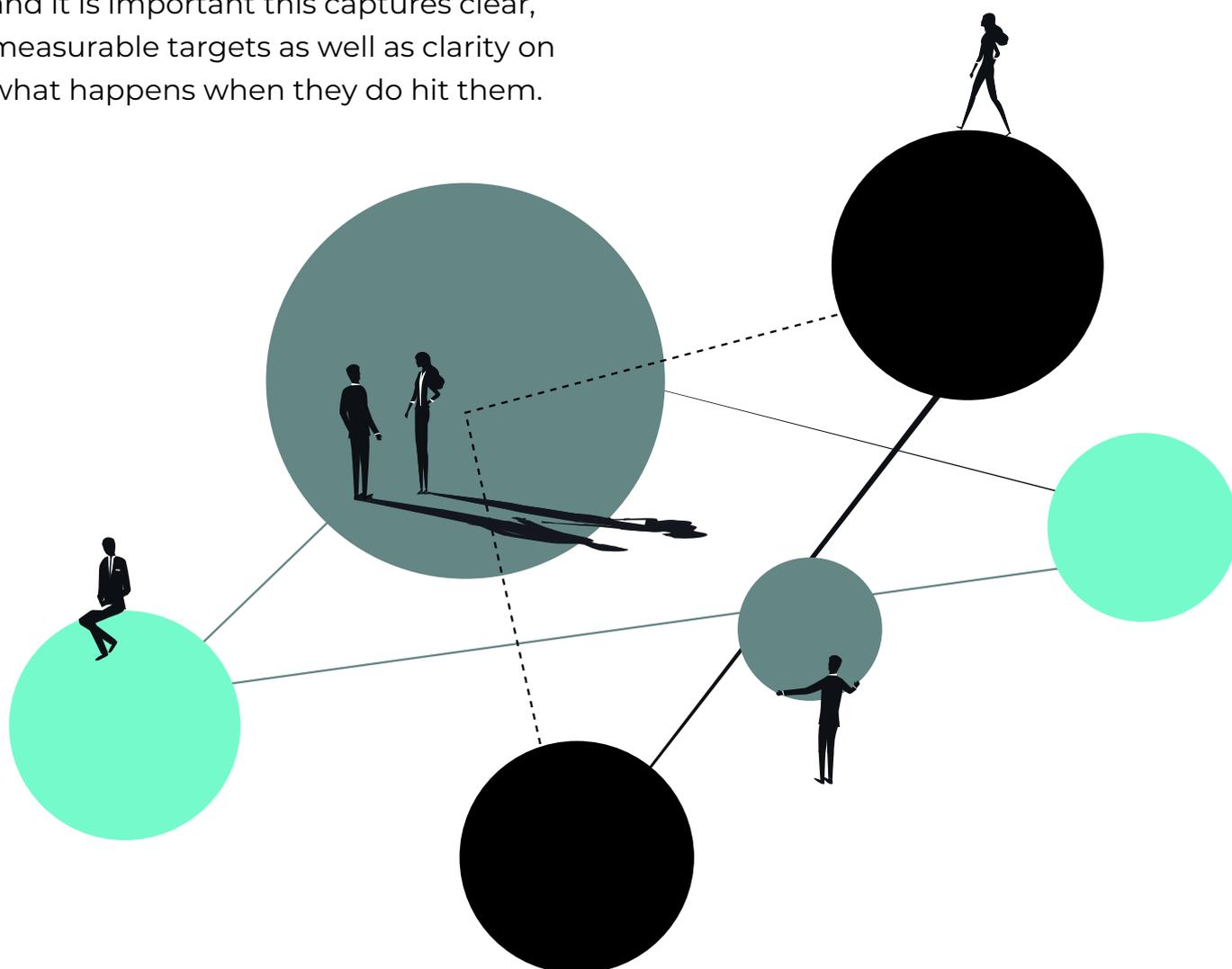
The PDP form is included within the pack.

PDPs are reviewed every three months and added to/amended on a quarterly basis within an official review meet. Salary and promotions are reviewed once a year as part of that process and would include pathway resets and discussions.

Team Objectives

The final element of the people plan is setting Mantra and objectives annually. These should reflect individual and company-wide targets and objectives to align the whole business.

> Doing this creates a sense of 'team'. An example might be:

What do we want to achieve by the end of the year?
Retention target of X met. We will do this by:

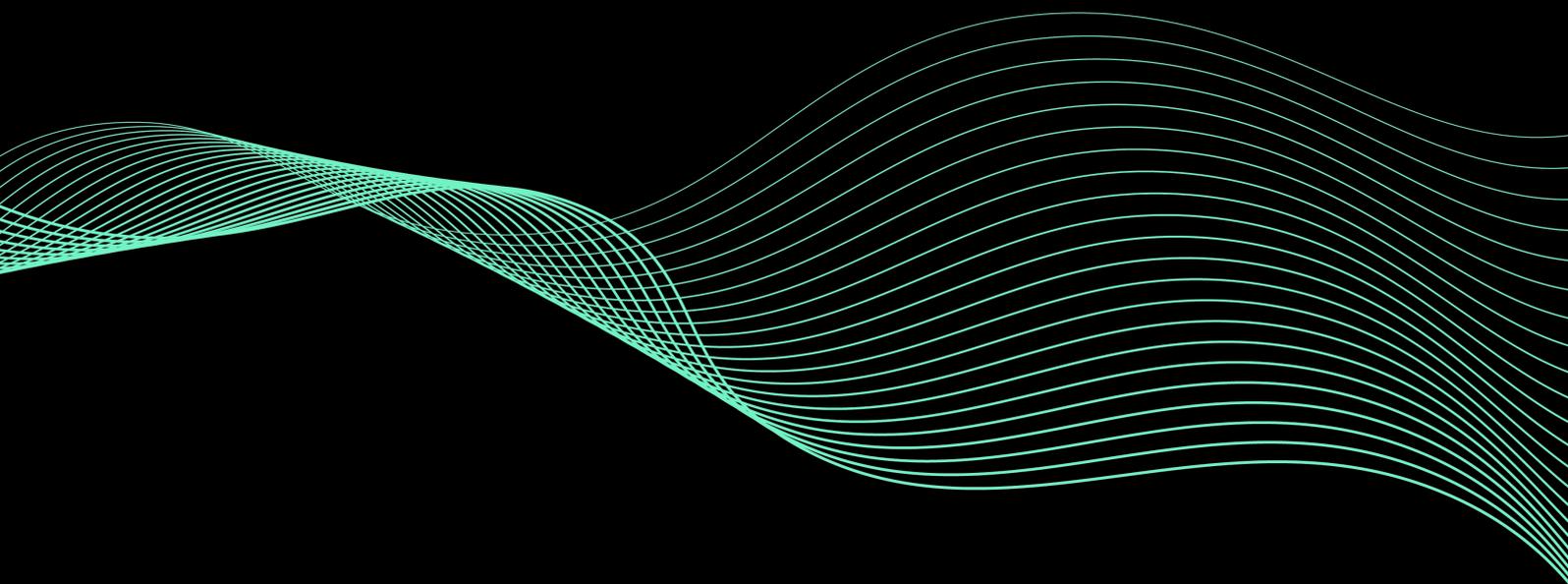|	
Become client seniors' best friends.	Through our Senior Contact Matrix plans, we will ensure that by the end of June all red cell contacts will have at the very least progressed to orange and that by the end of the year, they will have progressed to green.
Work from client offices.	We will ensure that either ourselves or key team members work from the offices of our tier 1 clients at least monthly.
One-on-one meets and entertainment.	By the end of the year, each Account Manager, will have met all of their main client contacts at least once one-onone.
Knowing client strategies inside out.	Every Account Manager will know their client strategies inside out, presenting them to the wider business every time they are created or refreshed.

Upsell target of XXX beaten. We will do this by:

Commercial training.	To help us better understand and spot opportunities, we will undertake commercial training by the end of June 2025.
Project into retained.	We will convert at least 8 projects into retained.
Growth of all tier 1	We will work with the Client Strategy Director to grow our all of our tier 1 client's retainers by 10% and secured projects from all tier 2 clients.

Document: PDP Example and template

Next steps

Below is a list of the key actions from this document, all of which can be run through as part of a session on the subject matter if helpful:

- ○ Create a pricing matrix to agree how much CS time any piece of new business needs.

- ○ Agree how the new pitch process works and how CS is involved.

- ○ Kickstart new onboarding process. Includes all internal and client meet schedules.

- ○ Create a matrix for reporting to pre-agree who gets what and when.

- ○ Review reporting process end to end.

- ○ Consider activity reporting dashboards

- ○ Planning process review – including strategy process and approach.

- ○ Creation of entertainment calendar and surprise/delight.

- ○ NPS/feedback process created.

- ○ Exec Sponsors set

- ○ New meetings framework introduced - weekly CS meet and so on.

- ○ New commercial strategy and process put in place, targets set and so on.

- ○ People Plan to include new PDP process, pathway, team objectives etc.

- ○ New org structure implemented.

- ○ All Hands meet introduction weekly.

- ○ New organisational structure agreed and shared.

- ○ PDP process introduced and added to calender for all. Targets set as part of it.

- ○ Client tiering completed

- ○ Pathways set for all.

- ○ Team objectives created

SCALED