# Towards KAM – Helping fee-earners with client relationship management

**Intermediate level**

When fee-earners have little or no training in selling or account management, it can be hard for them to know how to develop relationships with their existing clients and referrers. This session provides ways to help them learn to create more effective relationships and paves the way for a structured key account management programme.

The workshop qualifies for 3.5 hours CPD.

## Topics covered

**Why choose PM Forum training? See overleaf…**

- **Introduction and aims**

- What does the fee-earner think is an effective relationship?
- What do you think is an effective relationship?
- The basics of key account management
- Developing your relationship with the fee-earner

- **Align**

- What does the fee-earner want to achieve?
- What does the client want to achieve?
- What is it that you want to achieve?
- Common obstacles
- Do you need a structured approach?
- Managing expectations – the long term view

- **Analyse**

- Financial issues and reality check
- Types of clients
- What makes a good service experience?
- How can we really add value?

- **Research**

- Understanding the broader business and sector issues
- Understanding the client relationship
- The value of client feedback – satisfaction and expectations
- Client policies and decision making
- Obtaining client feedback
- Lessons from FT/MPF research
- Leveraging best practice

- **Prepare**

- Structuring telephone calls and meetings
- Having strategic conversations – key questions
- Identifying needs and opportunities

- **Broaden**

- From the case/work to strategy
- From business to personal
- Social media and regular contact (role of marcomms)
- Introducing others
- Relationship mapping (bow ties and diamonds)
- Cross selling

- **Planning and systems**

- What sort of plan do you need?
- What sort of plan does the fee-earner need?
- What support and resources are needed?
- Monitoring systems

- **Summary and conclusions**

## Tuesday 2 July 2019

This half-day workshop takes place from 9.30 to 13.00 starting with a light breakfast.

**To facilitate interaction, workshops are restricted to 18 attendees – maximum of four per firm**

## Trainer

**Kim Tasso** has worked within and for over 200 professional partnerships in the legal, accountancy and property sectors for over 20 years and continues to do so as a management consultant.

She also has direct client exposure from working with organisations in the technology, education, creative, media, real estate and not-for-profit sectors and through her work with a leading business school.

Unusually, she combines psychology, marketing and business qualifications so is effective both as a professional trainer, facilitator and coach and also as a subject matter expert in a variety of strategy, marketing, selling and relationship management topics.

She is highly rated as a trainer and coach for lawyers, accountants and surveyors and also lectures on Chartered Institute of Marketing (CIM) professional marketing qualifications for Cambridge Marketing College.

She is the author of books on growth strategies, business development, media relations and business development and a prolific conference speaker and journalist. She is commissioning editor for *PM* magazine.

Further information at www.kimtasso.com.

## Eligibility

This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 4,000 marketers in professional services firms. Visit www.pmforumglobal.com

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## Why PM Forum training?

Courses are designed and delivered by **qualified and experienced professionals** who:

- have substantial experience working with both **senior fee-earners and marketing/business development professionals** in large and small professional service firms across the **legal, accountancy and property industries** as well as a variety of client markets
- have psychology credentials and many years' experience **in learning and development** to ensure an optimum learning experience
- are **subject matter experts** in strategy, marketing, selling, client relationship management and interpersonal skills who continue to practice and are therefore familiar with the latest developments

And delegates receive a **productive learning experience** because:

- There is a balance between knowledge transfer and active learning through **interactive discussion** and group exercises
- Courses are highly **experiential** – where idea sharing and networking are encouraged
- As well as copies of the presentation material, courses also include work sheets and **supplementary materials** with guidance for further learning. Some courses have exclusive booklets tailored to the needs of delegates
- Course leaders are experienced coaches with experience in **career development** and certificates of completion are issued for use in **Continuing Professional Development** (CPD)
- Dialogue can continue after training through members-only **LinkedIn communities**
- Only PM Forum members can attend events

## Venue

tbc, Central London

## Fees

| | |
|---|---|
| First attendee | £230 + VAT |
| Second attendee | £220 + VAT |
| All subsequent attendees | £210 + VAT |

These prices are only for attendees booked concurrently. No booking can be confirmed without payment. The fee includes: continental breakfast • mid-morning tea/coffee • folder of workshop material

## Cancellations/Substitutions

Due to the restricted number of places, refundable cancellations are only accepted up to one month prior to the event (a cancellation fee of £25 + VAT will be incurred per person). Substitutions can be made at any time. PMI reserves the right to cancel with no liability beyond refund of fees paid.

## Towards KAM – Helping fee-earners with client relationship management – 2 July

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| Name ........................................... | Name ........................................... | Name ........................................... |
| Position ....................................... | Position ....................................... | Position ....................................... |

Firm ........................................................................................ Type of firm ........................................................

Address ...........................................................................................................................................................

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Tel ....................................................................... E-mail .........................................................................................

Please enclose a cheque made payable to *Practice Management International LLP*
**or** pay by Visa/Mastercard/Maestro/AmEx *(please circle one)*

Cardholder name: ........................................................................................ Amount: £ .....................................

Card number: ........................................................................ Expiry date: ...................... Security code: ......................

Signed ........................................................................................... Date ............................

*Confirmation of booking will be sent by return along with a VAT receipt*

Please return this form to: **PM Forum, 422 Salisbury House, London Wall, London EC2M 5QQ**
**Tel: 020 7786 9786 training@pmint.co.uk www.pmforum.co.uk**