



07940 886677

www.thrivingcompany.co.uk

A member of The Winning Firm Alliance

Case Study – MAKING CLIENT RELATIONSHIP MANAGEMENT WORK

The Firm

The Firm is a UK based consultancy with expertise in property management, construction, sustainability consulting, and in helping academic and public sector institutions gain the best results from their resources.

The Business Problem

The CEO recognised that the firm was underperforming in its client relationship management activity, compared to professional services peers, and that its existing ability to manage and extend client relationships placed it at a competitive disadvantage.

The firm had aspirations to grow and to operate as true business partners with its clients, but most relationships were conducted at a transactional level. Additionally, while there had been initial attempts to create clarity around how accounts would be managed, it was struggling to make this operational.

Put bluntly, the CEO believed there were major potential revenue and relationship benefits from managing client relationships more effectively, that were not being secured.

The Solution

The first element involved providing a means for directors to review current performance against the Thriving Company CRM performance benchmark. This clarified where efforts were lacking, sized the difference in performance against peers, and created senior level consensus about the need to improve.

Through facilitating further discussion within senior management, we also defined a “route map” for the firm to implement key areas of CRM best practice which were previously lacking, together with an implementation plan which set clear accountability for the accomplishment of important milestones. By inputting into a CRM vision and providing input into the internal communication messages and plan, we helped the CEO set out a clear picture for employees and to engage them in a shared direction and view of success.

Based on our detailed understanding of CRM efforts across over 500 professional services firms, as gleaned by our benchmark study done in conjunction with Professional Marketing Forum, and associated consulting efforts, we also reviewed the firm’s contact database. By determining a number of easy to implement changes, a much more solid platform has been created for Account Managers and others to share key information and to manage relationships more effectively.

The Benefits

The CEO and senior directors now have the clear direction and means to deliver on their CRM vision, both for the benefit of clients and employees. There is now a clear drive around CRM and confidence that they will secure business benefits.