

■ Case Study

- Key Account Skills in Professional Services

Synopsis

A large professional services firm needed to develop key account skills for 100 of its UK staff. The project involved account awareness training and analysis, using bespoke tools and training, in 7UK regional offices over a 2 month period. This was part of a major programme to make the management more customer orientated.

Background

The client's team had previously been trained in sales and marketing, cross-selling for other business units and customer performance reviews. This stage of the programme identified Major Client Accounts (typically between £1m and £8m pa) and developed skills in successfully managing and growing these accounts. The client base varies from major UK and International Government Departments to Privatised Utilities, UK and International Contractors, Public Private Partnership Project Developers and Large Industrial Concerns. The income from these accounts is over £40m pa. More than 100 staff senior people are involved in managing the interface with these clients. As with many top professional service businesses, their technical skills and interpersonal skills were already highly developed.

Methodology

The Key Account programme helped staff develop in terms of:

- Better internal information exchange on client requirements between different functions and locations
- Establishing Client Specific Directors accountable for servicing the current and future needs for each major client
- Developing into "trusted advisors" from a background of task orientated professionals. This ensured that account teams were recognised as pro-active collaborators, benefiting their Clients' business goals and hitting the "value zone"
- Identifying areas to partner with Clients to deliver better value to the Clients' own customers and stakeholders
- Seeing things through the eyes of the Client, rather than as a technical support service, by getting a greater understanding of business issues for each organisation.

On completion of the programme, a report was produced with specific recommendations and delivered to ServQ's Client's Managing Director.

Outcome

Over 100 people (10% of the company's regional staff) were trained in how to work together with their Major Clients, in a more integrated manner. The value of commissions from these accounts has risen significantly over the 12 months since the programme, leading to more referral work and a better commercial climate.

Reference

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