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Client/Customer Service Review (CSR) Meeting

The purpose of the CSR process is to make sure we are optimizing our services/products to our best clients/customers (i.e. taking exceptional care of our best clients/customers).

Consider the following list when selecting a client/customer for a CSR meeting:

1. Is the client/customer a high potential client (i.e. Either currently or in the future will provide significant profitable revenues; and/or have they been or do you anticipate them being a good referral source for new customers/clients)?

2. Do the client/customer needs match well with the services/products we provide?

3. Is there an opportunity to provide additional services/products to the client/customer?

4. Is this a client/customer that we really do not want to lose?

Who should participate in the CSR meeting?

1. Consider diversification of those attending to get a variety of points of view.

2. Invite various levels of team members serving them.

3. Invite team members from various departments.

4. Consider inviting team members who are not involved but may have a fresh perspective.

5. Consider inviting top leaders of your company to the meeting.

6. Consider inviting a team member, who is not involved with the customer/client, but is a really great "Out-of-the-box" thinker?

Considerations for setting up the meeting:

1. Length of meeting - Usually two hours will be sufficient. If it is felt that more time is needed, consider more than one meeting and possibly with different attendees.

2. Have some team members join by phone.

3. What is the best time of the year to conduct the meeting (i.e. preceding or immediately following some major project)?

Preparation for CSR Meeting:

1. Prior to the meeting, the most senior team member serving the client should get feedback directly from the client on your performance. Depending on the client situation, it may be helpful to get feedback from several customer/client personnel. Summarize the input for the CSR meeting.

2. Compile basic information (You may want to develop a standard form that your company can use for this process) about the client/customer including key client personnel including ownership, if applicable, your team leader primarily responsible for serving this client/customer, other team members who serve this client, describe primary client/customer contact and touch points during the year, briefly describe the client/customer goals for the next 5 years, what industries do they serve, what major clients/customers do they serve, list client/customer multiple entities/departments/divisions/subsidiaries that we serve, if applicable.

3. Obtain an organization chart of the customer/client. If there is not a suitable chart available, consider creating one with an emphasis on the customer/client personnel, who are critical to your success.

4. Compile a list of competitors who could replace our company. Is the competitor already working with the customer/client? Does this competitor have perceived strengths we do not have? Are they lower cost providers? Do they have a champion inside the customer/client?

5. If applicable, compile financial/business statistics including sales, profitability if know, head count, locations, accountants, bankers, lawyers, fiscal year end.

6. Summarize annual sales/revenues from this client/customer by service area or product.

7. Consider compiling information about the client/customer obtained from public sources like the Internet.

8. Assemble any internal tools that summarize services and product offerings.

9. Compile a cumulative list of specific services or favors provided to this customer/client over the years where you have saved them money, help them make more money or a personal favor (i.e. Helped a son or daughter find a job).

10. Send all the information compiled

CSR Meeting Ground Rules & Administrative Considerations:

1. The conversation should be a free flow of ideas. Avoid attacking or being defensive. This is chance to brainstorm and explore.

2. Assign someone the responsibility to take notes.

3. It may seem obvious, but make sure someone is the chair of the meeting, which includes watching the time, knowing when to stop a conversation (BTW, often, these meetings identify an issue that the team will try and solve in the meeting. That is not the purpose of the CSR), etc.

CSR Meeting:

1. Assume meeting attendees have read the advanced materials and have a basic understanding of the client. Do not waste time in the meeting with basic information. Hit the ground running.

2. Start with assessing your relationship with the client. Do you have excellent relationships with all the key stakeholders? Do you go high enough into the organization? (Ideally, you would have great relationships with the owners. Although in larger organizations, this may not be possible.

3. What is the most serious threat to losing this customer/client? What can you do now to mitigate or reduce the chances?

4. Determine if there are leaders in your organization who should be introduced to the client/customer leaders.

5. When assessing the relationships, evaluate strength. For example, is the relationship, just business or personal? Do you have an insider? (i.e. If you get into trouble at the client/customer, do you have someone who will coach you and let you know what is really going on, and suggest remedies?)

6. What other consultants/advisors serve your client/customer? If applicable, do you have relationships with them?

7. Develop list of new areas of service/products or areas that need attention, and customer/client personnel, with whom you should deepen your relationship. Make sure the list is doable. Less goals that get accomplished are better than more that don't.

8. Assign team member responsible for each follow-up item with due dates.

Post Meeting Follow-up:

1. Someone should prepare meeting notes with an emphasis on action items with due dates and team member responsible.

2. Notes should be distributed to all participants and appropriate leaders (i.e. Owner/CEO/President, Division Leader, Business Unit Leader, etc.

3. Consider sharing the notes (or a sanitized version) with the client/customer. For sure, consider telling the client/customer about the CSR meeting. Be deliberate about what and how you communicate, so as not to trigger a negative outcome (i.e. They seem nervous about something).

4. The CSR meeting and related follow-up should be discussed in the team leader's (and possibly others) annual career planning session.

Customer/Client Follow-up:

1. At a minimum, should probably tell the customer/client about the CSR meeting and share some of the ideas generated: " Several of my colleagues and I spent two hours to review our relationship, where it could improve, and additional ways we could help you."

2. Consider sharing the meeting notes or a sanitized version.

3. Consider setting up a meeting with the customer/client to review the CSR ideas. Think about who should attend the meeting. If appropriate, consider having your most senior executive in attendance.

4. If the customer/client is really sensitive to fees, consider mentioning the CSR meeting was an investment in the relationship.

Future CSR Meeting:

Based on the client/customer and the results of the CSR meeting, determine how often to conduct the review. Generally, for really significant clients/customers annually would be appropriate. For others, every two or three years would be suggested.