

Two day non-residential

Sydney

9 – 10 June 2005

10 – 11 November 2005



# Enhancing High Value Client Relationships

Client leadership in a professional services environment

No. 1 in Australia and Asia for open enrolment programs

No. 1 in Australia and Asia for custom programs

*Financial Times* (UK) 2004 Executive Education Rankings



**“Very insightful program that helped in clarifying  
my understanding in assisting a high net worth of clients.”**

**Jason Kusenic**, Retail Practice Manager, Tower Trust Ltd

*(Please note: Cover photo and testimonial are not related.)*

**“A lot of thought provoking material to put relationships into context and help move them to their next level.”**

Alexandra Almond  
Business Analyst  
National Australia Bank

**“A fantastic step-by-step guide to effectively adding value to client relationships.”**

Michael J Fisher  
Key Account Manager – Gaming Division  
Tabcorp holdings Ltd

[www.agsm.edu.au/ehvcr](http://www.agsm.edu.au/ehvcr)

## Overview

Clients of professional service organisations are increasingly mobile, relationships are shifting to panels and tenders, new competitors are rapidly emerging and digital technologies are commoditising services and shifting client communication. Loyalty is a thing of the past, and professionals must continually demonstrate their ability to provide better service and results than their competitors.

Advanced client relationship skills and strategies are increasingly important for the success and advancement of every professional. *Enhancing High Value Client Relationships* will give you the tools to succeed in a highly competitive world, which is becoming largely based on dealing effectively with sophisticated clients and their rapidly evolving attitudes to professional services providers.

This program will be of value to those who have responsibility for client relationships including senior executives, partners and associates, relationship managers and all business development and marketing executives. The content is applicable to all professional services industries (such as law, accounting, audit, management consulting, technology services, investment banking, corporate financial services, engineering and advertising). It is also highly relevant to relationship managers in other complex industries such as software, outsourcing, communications, logistics and construction.

### Capabilities/Topics Addressed

- Client retention
- Customer relationship management
- Customer service
- Professional service firms
- Strategy development and execution

### Key Benefits

- Learn the key stages of the relationship development process and how to lead your clients into partnership-style relationships
- Design powerful client strategies that deepen relationships and open up valuable business opportunities
- Understand how to lead client relationship teams to build organisation wide relationships
- Implement practices and processes to create deep, trusting client relationships
- Adapt your communication style to your clients to create effective working relationships
- Improve client knowledge and customise service to lock in clients
- Develop key relationship skills, including effectively managing client expectations
- Set action plans to improve your and your organisation's relationship capabilities

The program will be run in a highly interactive format, allowing you to apply the workshop content immediately to practical situations in your workplace. Both days of the program are based on detailed content and frameworks, and a combination of highly interactive sessions that include class and syndicate discussions, case studies and exercises.

All participants will receive a copy of Ross Dawson's bestseller *Developing Knowledge-Based Client Relationships: Leadership in Professional Services*.

**“This program provides those with a basic knowledge and simple systems to turn things around and really put some processes in place to drive client relationships.”**

Sandi Ferrie  
Client Relationship Manager  
Mallesons Stephen Jaques

### Executive Programs E-Snapshot

Opt-in to receive our monthly email bulletin by visiting:  
[www.agsm.edu.au/esnapshot](http://www.agsm.edu.au/esnapshot).

Our Executive Programs E-Snapshot will provide you with a listing of upcoming executive programs with links to our website for further program information. From time-to-time we may offer you special deals and details of new programs. You can unsubscribe at any time.

**“Well presented broad based information that expanded with class participation allowing additional insight.”**

**John Blake**  
Client Service Representative  
Offset Alpine Printing



**Ross Dawson**

[www.agsm.edu.au/ehvcr](http://www.agsm.edu.au/ehvcr)

## Agenda

**Day 1      8.15am Registration      9am start**

### **Practical frameworks and principles for high-value client relationships**

- What sophisticated professional services clients expect today
- The virtuous circle of knowledge-based client relationships
- How connectivity, transparency and commoditisation are shifting relationships
- Understanding the four key stages of relationship development
- Leading your clients from commoditised to partner relationships

### **Developing and implementing client relationship strategies**

- Tools and processes for developing useful client relationship strategies
- Setting and achieving relationship objectives
- Establishing relationship roadmaps, milestones, timelines and action plans
- Key client contact strategies and dealing with client gatekeepers
- Client segmentation and migration to capture value

### **Effective client communication, service and relationship development**

- Understanding and managing client expectations
- Developing trust: effective values, beliefs, and behaviours
- Gaining deeper client knowledge and customising service
- Understanding and adapting communication styles
- Online communication and implementing collaborative tools

**Day 2      8.30am**

### **Leading and participating in client relationship teams**

- Models for building organisation-wide relationships
- Effective formation and leadership of client relationship teams
- Enhancing relationship team communication and collaboration
- Cross-selling strategies and realities
- Client feedback processes and feedback loops

### **Building client partnerships**

- Discovering and developing client partnership opportunities
- Principles and action steps for successful client alliances
- Aligning with your clients for deeper, broader, more profitable relationships
- Implementing knowledge transfer and client collaboration
- Value based pricing and joint development of intellectual property

### **Implementation and key client programs**

- Winning major clients in transition
- Enhancing your organisation's client relationship capabilities
- Social network analysis and other relationship tools
- Establishing and implementing key client programs
- Setting personal action plans

## Program Director

Ross Dawson is CEO of Advanced Human Technologies, a boutique international consulting firm that works with major professional services, financial services and technology firms to enhance their strategic and client relationship capabilities. Clients for Ross' speaking, seminars and consulting include Allens Arthur Robinson, AMP, Austrade, BNP Paribas, Ernst & Young, IBM, KPMG, Lend Lease, Macquarie Bank, Morgan Stanley, Microsoft, Optus, Westpac Institutional Bank and other leading organisations .

Ross is author of the acclaimed book *Living Networks* published by Financial Times/ Prentice Hall and *Developing Knowledge-Based Client Relationships: The Future of Professional Services*, which is a global professional services best seller, was the #1 selling book on Amazon.com in Australia (February and March 2000), and is being launched in its second edition in 2005. Ross works worldwide as a keynote speaker and seminar leader, and has run executive programs and lectured at numerous academic institutions in Australia and overseas. He is on the advisory board of the US based Business Development Institute. Prior to establishing Advanced Human Technologies in 1996, Ross worked in a variety of senior positions in London, Tokyo and Sydney, most recently as Global Director – Capital Markets for Thomson Financial, and in relationship management roles for Merrill Lynch and NCR. He holds a B.Sc.(Hons) from Bristol University, UK. Ross has extensive international business experience and speaks five languages .

**“Great insights from other program participants from a broad spectrum of business experiences dealing with similar issues that I face in my current role.”**

**Jason Cooper**  
Key Account Manager  
TabCorp Holding Ltd

**“Ross Dawson had a fantastic hold on the subject and his references to real life situations made it easy to understand the concepts.”**

**Satish Bhoopathi**  
Business Relationship Manager  
Birlasoft Limited

# Application

## Enhancing High Value Client Relationships

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☐ 9 – 10 June 2005

☐ 10 – 11 November 2005

■ [www](http://www.agsm.edu.au)

### Participant details

name	title first name family name		
	preferred given name (to appear on name badge)		
position/division			
organisation			
business address			
	suburb/city	state	postcode
telephone	switch	direct	facsimile
email			
	no. of employees	major industry of employer	main area of occupation
how did you hear about this program?			
<input type="checkbox"/> direct mail <input type="checkbox"/> past participant <input type="checkbox"/> HR/training department <input type="checkbox"/> my manager <input type="checkbox"/> advertising			
<input type="checkbox"/> website <input type="checkbox"/> AGSM representative <input type="checkbox"/> other (please specify) _____			

☐ I would like to subscribe to AGSM's monthly Executive Programs e-mail bulletin

### Person in charge of executive development in your organisation

name	title first name family name		
position/division			
organisation			
business address			
	suburb/city	state	postcode
telephone	switch	direct	facsimile

### I agree to the conditions of enrolment (we are unable to accept this application unless signed)

name/position	
authorising signature	date

### Payment method (payment must be received before the start of the program)

☐ I enclose a cheque payable to AGSM

☐ Please charge to my credit card the amount of

\$

Card type: ☐ B/card ☐ M/card ☐ Visa ☐ Amex ☐ Diners

card number																expiry date
name on card																
signature of cardholder																

☐ Please send a tax invoice (complete details of the person to receive the invoice)

name	title first name family name		
position/division			
organisation			
business address			
	suburb/city	state	postcode
purchase order no.	(if applicable)		

☐ I no longer wish to receive information on AGSM Executive Programs. Please delete me from your distribution list.

### How to enrol

Please complete and fax your application to +61 2 9931 9370 or enrol online at [www.agsm.edu.au/execed](http://www.agsm.edu.au/execed)

If you are sending a cheque please mail to: Client Services, Executive Programs AGSM Limited UNSW SYDNEY NSW 2052 AUSTRALIA

### Enquiries

Client Services  
phone +61 2 9931 9333  
email [enquiries@agsm.edu.au](mailto:enquiries@agsm.edu.au)  
fax +61 2 9931 9370  
website [www.agsm.edu.au/execed](http://www.agsm.edu.au/execed)

### Fee and venue

The program fee is \$2,530 (\$2,300 + 10% GST) and includes meals and program materials. The programs will be held at the AGSM CBD Campus at 1 O'Connell Street, Sydney and the AGSM Kensington Campus, Randwick.

### Conditions of enrolment

Payment must be received before the start of the program.

### Cancellations:

A full refund will be provided if advised in writing 10 working days prior to program commencement. A cancellation fee of 60% of the program fee will apply if less than 10 working days notice is given. The full program fee is forfeited if participants fail to attend and have given no notice.

### Transfers:

Participants are allowed one transfer at no penalty if notice is given in writing 10 working days prior to program commencement. Transfers within 10 working days of program commencement incur an administration charge of \$275. The full program fee must be paid for subsequent transfers.

### Substitutes:

For the majority of our programs, another participant can be substituted without penalty up to the program commencement date.

The AGSM reserves the right to cancel a program if circumstances necessitate. If a program is cancelled, the AGSM will make every effort to advise you and a full refund of the paid fee will be made.

### AGSM privacy statement

The AGSM acknowledges and respects the privacy of individuals. We advise that information that you may have provided, or may be asked to provide to the AGSM is 'personal information' as defined by the Privacy Act 1998 (Cth). This information is collected for the purposes of processing your application, registration or enquiry for an AGSM activity or interest group and for providing services from AGSM to you. It may be used for keeping you informed of upcoming events and assisting us in improving and marketing our services to you. Unless you tell us otherwise, we will continue to use the information we obtain about you in this way. The AGSM is a School of the University of Sydney and the University of NSW and may share information collected with these entities for the same purposes. Personal information collected by AGSM is not released to other organisations or persons, except in response to a legal requirement such as a subpoena, or with your consent.

All information collected by AGSM will be kept secure and you have the right of access to, or modification of your record at any time. For information concerning your right to seek access to your personal information, please contact Client Services on +612 9931 9333. Our privacy policy is available from AGSM Marketing.



The AGSM is a School of both The University of Sydney and The University of New South Wales.

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