

# Client Experience Management and onboarding

Intermediate level

CEM, CXA, Cx, Ux and onboarding may be the latest buzzwords but the client experience has always been fundamental in professional services. It is a key differentiator and the main way that value is delivered to clients. But with so many different services being provided by a variety of fee-earners it can be challenging to develop aims, programmes, systems and behaviours that support the brand and deliver maximum client satisfaction whilst maintaining profit levels. This session looks at what professional services firms can learn from consumer and commercial markets and offers practical help. The workshop qualifies for 3.5 hours CPD.

## Topics covered

Why choose PM Forum training? See overleaf...

### Introduction

- What is client experience management (CEM)?
- Highlights from public research studies

### CEM concepts

- Touch points and moments of truth
- Rational vs emotional perceptions
- Understanding client expectations
- Multi-channel client communications

### Mapping the client journey

- Digital journeys
- Managing the marketing and selling experience
- Enhancing the on-boarding process
- Client service excellence – overcoming silos
- Billing processes
- *Exercise: Mapping the client journey*
- Lessons from retail and consumer markets
- Understanding critical incidents

### Changing behaviours

- Engaging fee-earners in CEM
- Integration with RM and KAM
- Change management insights

### Developing processes and systems

- *Exercise: What information and systems are required for CEM?*
- Measuring client experience satisfaction
- Managing service failures
- Service innovation - technology and product/service development

## 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](http://www.pmforumglobal.com)



Thursday 26 April 2018

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](http://www.kimtasso.com).

For more information on other training workshop visit [www.pmforum.co.uk/training](http://www.pmforum.co.uk/training)

## 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

Mathys & Squire LLP  
The Shard  
32 London Bridge Street  
Londo  
SE1 9SG

## Fees

First attendee £225 + VAT  
Second attendee £215 + VAT  
All subsequent attendees £205 + VAT

**Maximum of four attendees from the same firm.** 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.

## Client Experience Management and onboarding – 26 April

Name ..... Name ..... Name .....

Position ..... Position ..... Position .....

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

Address .....

..... Postcode .....

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: £ .....

Security

Card number: ..... Expiry date: ..... 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**

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