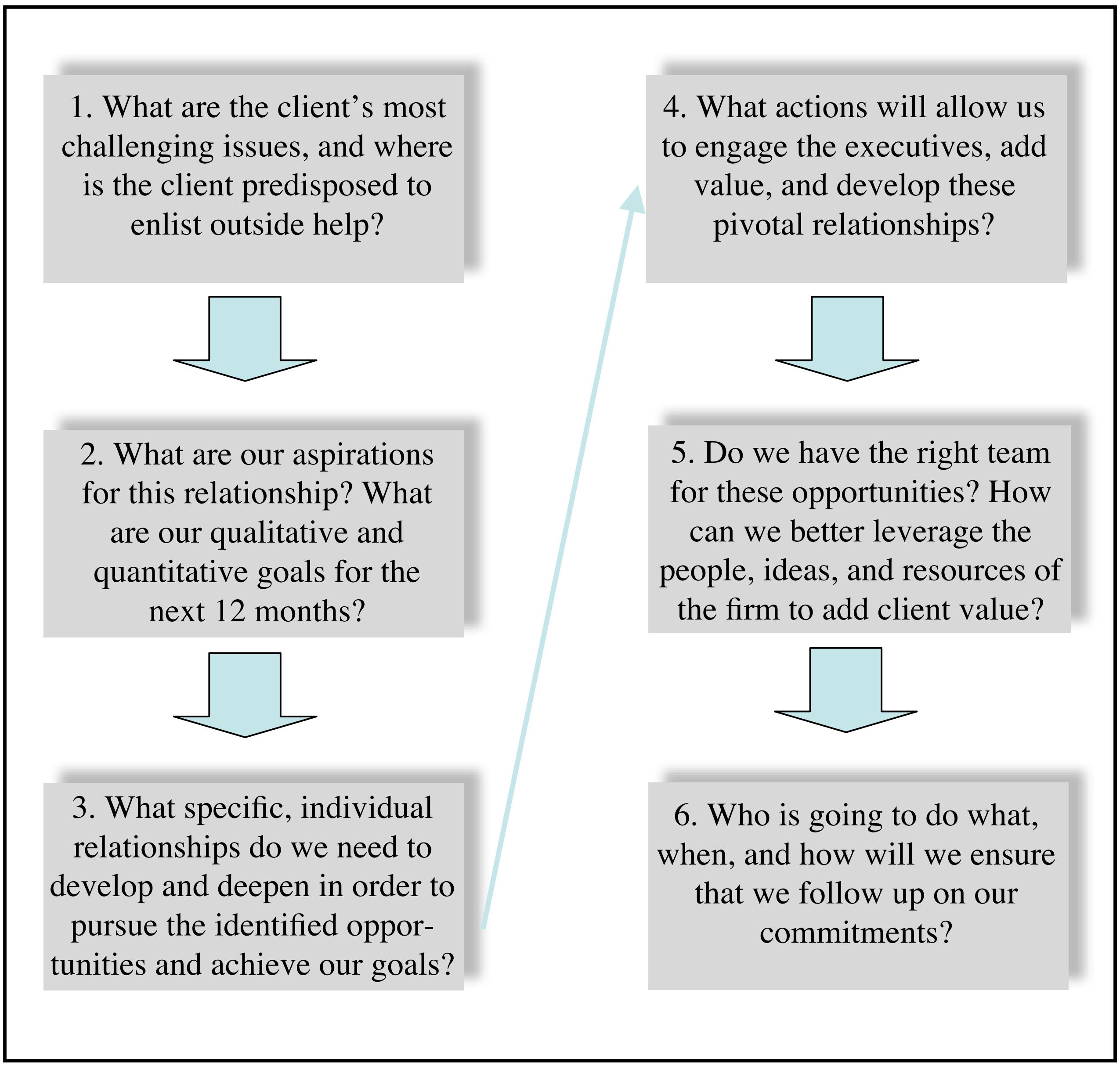
Client Account Planning and Development

A Brief Overview

By Andrew Sobel

The client relationship manager or account executive must lead the client account planning and development process. He or she and the team members should take time--a half a day or day--at least twice a year and perhaps even quarterly to assess progress, reflect, and strategize about how to strengthen and grow the client relationship. Ideally, a senior professional who is not part of the day-to-day relationship should participate in these discussions to provide objectivity and a fresh perspective. A series of basic questions can guide this process:



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