



# Client Relationship Management Policy and Procedure

Policy Number: 202180

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Guidance: This policy should be read and carried out by all staff for establishing, building, and maintaining business relationships and when engaged in professional networking activities.

- Ace Finance and Accounting considers anyone who contacts or communicates with the mass valued Client.
- Ace Finance and Accounting is dedicated to giving Clients the best possible Client service.
- Ace Finance is dedicated to processing any enquiry in the timeliest way possible.
- Ace Finance and Accounting is dedicated to meeting Client's realistic expectations in the highest quality of services.
- Ace Finance and Accounting sees all the Client's need as varied and acceptable. Ace Finance and Accounting will tend to each one through a fair approach within appropriate timelines.
- Ace Finance and Accounting will always treat each Client with honesty and integrity.
- Ace Finance and Accounting will not assume they know what the Client wants. Ace Finance and Accounting will always aim to dig for their need/s or complaint/s and find out the facts.
- Ace Finance and Accounting will address any enquiry or complaint in an easily understood way. Ace Finance and Accounting representatives will be clear, concise, and straight to the point.
- Ace Finance and Accounting must provide an initial response by the next working day to all phone enquiries and complaints.
- Ace Finance and Accounting representatives will always introduce themselves to anyone contacting Ace Finance and Accounting.
- Ace Finance and Accounting representatives will not address enquiries or complaints in a "run-around" manner. Ace Finance and Accounting representative will properly escalate or transfer enquiries or complaints to another person who is in a better position to assist the Client.

## Client Relationship Management Procedures

The following procedures are maintained in the interests of continual improvement:

### 1. A database for Client activity: The database will contain information about the following:

- Transactions - including a complete purchasing history with accompanying details.
- Client contacts from multiple channels and contexts.
- Descriptive information for segmentation and other data analysis purposes.
- Response to marketing stimuli - whether the Client responded to a direct marketing initiative, a sales contact, or any other direct contact.
- This data will be collected overtime.

### 2. Client Relationships: The overall goal of each Ace Finance and Accounting relationship building program is to deliver a higher level of Client satisfaction than competing firms deliver.

#### 2.1 Establishing Relationships with Clients

- Smile and be courteous and friendly at all times
- Use their name and introduce yourself
- Ask questions to identify their needs
- Create a new client file
- Explain what Ace Finance and Accounting is about and what products and services are offered

#### 2.2 Maintaining Relationships with Clients

- Smile and be courteous and friendly at all times
- Use their name
- Offer assistance and advice
- Ask questions to identify if their needs are being met or they need further assistance

### 3. Relationship programs include:

- **Client service:** Client service must receive the highest priority within the agency. Any contact or 'touch point' that a Client has with Ace Finance and Accounting is a Client service encounter and has the potential to gain repeat business and help CRM or have the opposite effect.
- **Customisation:** Ace Finance and Accounting will create products and services specifically for individual Clients, and not simply communicating with the mass when 1-to-1 marketing.
- **Community:** The Ace Finance and Accounting website is allowing both online and offline businesses to build a network for exchanging product-related information and to create relationships between the Clients and company or brand. The goal is to take a prospective relationship with a product and turn it into something more personal. This allows the accounting agency manager to build an environment which makes it more difficult for the Client to leave the 'family' of other people who also use these services.
- Community-based initiative working with schools, shopping centres, young or older citizens is also encouraged to 'give something back' to the community. This will enhance and raise the Ace Finance and Accounting profile and engender loyalty.

All of these measures are simply doing a better job through acquiring and processing internal data and focusing on how the company is performing at the Client level.

## 4. Addressing Client Needs:

### 4.1 Understanding Client Needs:

- A full consultation should be conducted when a client becomes a new customer of Ace Finance and Accounting, to identify their needs, issues or concerns.
- Members may request a consultation with an accountant at any time, should they wish to discuss their financial goals.

### 4.2 Clients Rights and Responsibilities:

- The Client rights and responsibilities will be explained to them during the consultation process.

### 4.3 Matching Client's Needs:

- Analyse your client's needs, issues and concerns and recommend two products and two services to give the client options to address their needs.
- A Product and Service Agreement will be signed upon the client determining their preference.

### 4.4 Communicating with Clients:

Regular Communication is conducted with clients in the following ways:

- Email, SMS: To communicate new products/services/specials/sales
- VIP Monthly Newsletters: To communicate new products/services/specials/sales
- Rewards Clubs: A card offering a bonus for repeat business, offered to all Clients
- Holding an 'Open Day/Night' to entice new Clients: Held once a month and advertised in media and social media.

### 4.5 Targeting Services to meet Client's needs:

- Decisions made about targeting the Ace Finance and Accounting services to meet Client's needs are always based on up-to-date information about the Client, and the Products and Services currently available.
- Referrals of Services must always be based on matching the assessment of the Client's
- Needs to the availability of Products and Services

### 4.6 Handling Difficult Client Service Delivery:

Areas of difficulty may include but not limited to:

Complaint regarding another Client, a staff member, a product or service, the standard of service or a legal matter

- Clients in person or over the phone
- Clients from a range of social, cultural, or ethnic backgrounds
- Clients who maybe unwell, drug-affected, or emotionally distressed
- Clients with varying physical and mental abilities

Actions you must follow when handling difficult areas of Client service:

- Follow Workplace Policy and Procedures for 'Conflict and Problem Resolution'
- Remain Calm and respond in a positive manner
- Listen to the Client using Active listening
- Ask questions that allow the Client to respond effectively

- Repeat back what you heard to clarify understanding
- Seek assistance from your supervisor-if you cannot resolve the situation yourself

You must always use a positive manner when handling a difficult area:

- Using positive language
- Using empathy (if required)
- Active listening

#### Review of CRM Procedures:

Review of these procedures must be completed in January of each year. The person reviewing the Procedures must complete the Procedure Analysis Form and store this form electronically for the Manager to access as required.