Kazzaz Consulting LLC

Client Care and Engagement Checklist

1. Research and Connect with Potential Clients

- ☐ Conduct online research (Google, LinkedIn) on potential clients
- ☐ Leverage internal network for existing connections
- ☐ Engage with potential clients on social media platforms
- ☐ Identify and attend relevant industry events
- ☐ Set up exploratory meetings with potential clients
- ☐ Organize lunch and learn events on topics of interest to potential clients

2. Categorize Clients

- ☐ Implement a structured evaluation process (quarterly or semi-annually)
- ☐ Assess clients based on criteria:
  - Revenue generation
  - Alignment with firm values
  - Potential for future projects
  - Quality of working relationship
- ☐ Categorize clients into tiers (e.g., Prime, Secondary, Potential)
- ☐ Allocate resources based on client categorization

3. Define Client Care Teams

- ☐ Assign dedicated client care teams to primary and secondary clients
- ☐ Designate a team lead for each client
- ☐ Include team members with direct or adjacent client relationships
- ☐ Incorporate relevant subject matter experts (SMEs)
- ☐ Schedule regular team meetings to discuss client strategy and opportunities

4. Client Engagement

- ☐ Develop a deep understanding of each client's industry and challenges
- ☐ Review industry publications and networks for client insights
- ☐ Anticipate client needs and offer proactive solutions
- ☐ Transform from service provider to trusted advisor

5. Get in Front of Your Client

- Schedule regular face-to-face client meetings
  - Prepare meeting objectives and questions
  - Assign roles to team members (e.g., note-taking, asking questions)
  - Practice active listening during meetings
- Develop and share educational content (white papers, case studies, industry reports)
- Host webinars or workshops on relevant topics
- Attend industry events where clients are present
- Engage with clients on social media (LinkedIn)
- Organize client appreciation events

6. Effective Communication

- Use clear and concise language in all communications
- Practice active listening in all client interactions
- Demonstrate empathy and understanding of client challenges
- Be mindful of non-verbal communication cues
- Seek meaningful conversations beyond immediate work

7. Long-term Relationship Building

- Offer proactive problem-solving, including occasional pro bono work
- Identify opportunities for cross-selling additional services
- Engage with clients at industry events and conferences
- Present comprehensive solutions leveraging the firm's full capabilities

8. Implement and Maintain a Client Management System

- Choose an appropriate client management platform
- Record all client interactions, appointments, and revenue data
- Map and visualize client relationships and connections
- Assign ownership of client relationships within the firm
- Ensure all teams have access to centralized client information

9. Regular Review and Update of Client Strategy

- Schedule quarterly or bi-annual strategy reviews
- Analyze key performance indicators for client satisfaction and revenue growth
- Stay informed about changes in clients' industries
- Gather and incorporate feedback from client-facing teams
- Align client strategy with overall firm growth objectives and market trends

10. Continuous Improvement

- Solicit client feedback regularly
- Conduct post-project reviews to identify areas for improvement
- Stay updated on industry best practices for client care
- Provide ongoing training to team members on client engagement strategies
- Celebrate and share success stories of excellent client care within the firm