

Commonwealth Medicine Client Relationship Management 101 Series

Client Relationships

When accessing this online on-demand module as part of a group learning experience, we recommend using this workbook in place of the online activities contained in the online module.

Old Myths vs. New Realities

Work individually - Assessment of current state:

- What I know adds value
- You can't measure the value I provide
- Client-driven mindset is for external clients
- Getting the job done is important
- Consistency across the organization is important
- Others...

Discuss as a group

What "Old Myths" are hindering stronger partnering relationships between us, internally, and our clients?

New Realities

Work individually - Assessment of current state:

- What I deliver adds value
- The value I provide leads to greater service delivery
- Client-driven mindset is for all clients/partners
- How I get the job done is important
- Seek adaptive solutions that meet unique needs

Discuss as a group

What “New Realities” need to become part of our mindset and behavior in order to provide better service to internal and external clients?

Roles Consultants Choose

Roles Consultants Choose	
The Expert Role	The "Pair of hands" Role
The Collaborative/Partnership	Resource

When a consultant takes the "expert" role, he/she basically manages the consulting process. The consultant plans the data collection, analyses the results, and decides on the best solution for his/her client.

The client's involvement in this process is minimal

Book, Peter (2011), Flawless Consulting

Discuss as a group

What are the skill requirements needed to be an "Expert"?

What might be the drawbacks of taking the "Expert" role?

Roles Consultants Choose	
The Expert Role	The "Pair of hands" Role
The Collaborative/Partnership	Resource

The "Pair of Hands" Role is just the opposite of the expert role. In this case, the client collects and analyses the data and determines the solution, and then has a (different) consultant implement the solution

Bock, Peter (2011), Flawless Consulting

Discuss as a group

What are the skill requirements needed to be a "Pair of Hands"?

What might be the drawbacks of taking the "Pair of Hands" role?

Roles Consultants Choose	
The Expert Role	The "Pair of hands" Role
The Collaborative/Partnership	Resource
<p>The basic goal of this type of consulting is to share the responsibility of the consulting process. In other words, the client and consultant share in designing data collection, share in collecting the data, share in analyzing the data, share in generating possible solutions, and then, the client takes the responsibility in choosing the solutions to implement. .</p> <p><small>Block, Peter (2011). <i>Flawless Consulting</i></small></p>	

Discuss as a group

What are the skill requirements for a Collaborative Consulting Partnership”?

What might be the drawbacks of taking the Collaborative Consulting Partnership role?

Recommended Reading:

Block, Peter (2011). Flawless Consulting: A Guide to Getting Your Expertise Used

The More Your Clients Trust You...

The more your clients trust you, the more likely they are to... Which are the most critical:

- Reach for your advice
- Be inclined to accept and act on your recommendation
- Bring you in on more advanced, complex and strategic issues
- Treat you as you wish to be treated
- Share more information that helps you help them
- Refer you to similar agencies where you can add value
- Warn you of dangers you might avoid
- Give you the benefit of the doubt
- Forgive you when you make a mistake

Work individually – Discuss as a group:

Select the most critical:

- Reach for your advice
- Be inclined to accept and act on your recommendation
- Bring you in on more advanced, complex and strategic issues
- Treat you as you wish to be treated
- Share more information that helps you help them
- Refer you to similar agencies where you can add value
- Warn you of dangers you might avoid
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Our Mission: To help identify and create solutions that improve health and well-being, focused on those served by public programs



MY ACTION PLAN – Client Relationship Management

Investing in Our Clients' Success.....

- 1) What did I learn today that I can utilize with all my clients?

- 2) Which client relationships are most in need of an infusion of trust?

- 3) What are the first few actions I will take to foster deeper trust in those relationships?