Relationship Management Job Shadow

Questions

- How does your agency document the annual plan for servicing each account?
- Who is responsible for creating and updating the plan?
- If your agency has a Stewardship Process, what are its major elements?
- How frequently should clients expect your agency will meet with them to review the relationship with your agency and the results you are delivering?
- What information is presented to clients at these periodic meetings?
- What information is gathered from clients before or during these meetings?

Steps

- Arrange two periodic relationship review or Stewardship Meetings with clients.
- Discuss the following questions for each of these meetings:
  - Who was the client?
  - What date was the meeting held?
  - What was the agenda for the meeting?
  - What was the most important information that your agency presented?
  - What did your agency learn from the meeting?
  - What was the client's reaction to the meeting?
  - What will your agency or the client do differently as a result of this meeting

Tracking and Managing Renewals

- What is your agency's process to identify and track upcoming renewals?
- What is the timeline for this process?
- What are the AE's responsibilities in this process?
- What are the producer's responsibilities in this process?

Renewal Meetings

- Arrange planning sessions to prepare for upcoming Renewal Meetings with 2 clients.
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- Discuss the following:
  - What are the critical steps in preparing for a Renewal Meeting?
  - When and how are opportunities to expand the relationship, cross-sell, or round out the account addressed in the planning process?
  - What is the recommended agenda or structure for a Renewal Meeting?
  - When and how are recommendations to expand the relationship with additional products, services, or solutions handled during the Renewal Meeting