Here's a guide I share with new account servicing teams who join my company, Paprika (http://www.paprikaglobal.com). These are methods of working I've picked up through the years and working styles I've come to value and see in individuals that stand out.

A) A MOMENT BEFORE WE PLUNGE IN

Given the pace of work and the lack of time seniors in the industry have to mentor new account & client servicing teams, it is easy to get so caught up with project work so much so that you end up "running around like a headless chicken".

Make a constant effort to stop and ask yourself these questions from time to time.

a. What role do you serve as client services?
   - Are you a messenger carrying messages back and forth or do you contribute more?
   - If your role is a messenger, isn't it easier for the client to speak directly to the creative team?
   - Do you help clarify and adjust the needs and requirements according to what you think is best?
   - Do you check work before sending it to the client to make sure its accurate and correct or do you just send it through without looking at it? Do you catch mistakes or do you let mistakes reach the client?

b. Are you a problem solver in the client agency relationship?

c. Is it a true relationship you are in or is it one-sided?

d. How much initiative do you have?
   - Do you wait for deadlines to be missed or do you chase both your colleagues and your clients to meet deadlines set?

e. How much time do you spend on keeping your skills relevant?

f. How much time do you spend on learning new things?

The greater your ability to solve problems, the more your colleagues and your clients will rely on and respect you.

The better you understand your client and be able to get a sense of what they will approve / not approve, the greater your value as an account servicing person.

The more time you spend reading, surfing, watching, listening, testing and playing with new technology, the faster you'll grow in this industry.

A piece of advice I'd like to offer is that communications is not about drawing lines. It's about integration across all lines (ATL, BTL, POSM & Digital), all disciplines (PR, CRM, events & communications) and all channels that a customer engages with.

Times are changing the dynamics of our industry and we're fast moving away from advertising to communicating and engaging.

B) OUTLINE OF WORK AREAS

This may differ from company to company, country to country so use this as a guide and adjust this according to your experiences. Understanding & being familiar with the entire process will greatly benefit you in the long term.

Client Meetings
- note taking of meeting points, discussions and agreements
- clearly identify and understand next steps
- contribute comments, ideas, feedback and opinions

Brief Taking
- gather relevant materials and project background from client
- understand purposed of each project
- define target audiences, deliverables, budgets, launch & roll out timeline

Work Presentation
- try to present at least 2 options to allow client a choice (steer them towards one choice)
- ensure materials are in order and briefed requirements are all delivered
- gather feedback and understand concerns & changes required
- contribute comments, ideas, feedback and opinions

Progress Meetings
- clearly feedback current progress and issues / concerns if any
- clearly identify and understand next steps

Contact Reports
- document meeting points, discussions, agreements and next steps after each meeting
- send to client in email or Contact Report Format
- ideally to be sent 24 hours after a meeting

Research
- identify areas of research with strategic & account leads
- research through internet and discussions with experts
- research through surveys and interviews with customer segments

Briefing Writing
- complete Campaign or Project Brief to team
- include relevant materials and project background information from client
- include research materials and findings from survey / interviews
- clearly define deliverables
- clearly define timeline

Brain-Storming / Development of Approach
- ensure team has read up on materials sent
- gather team for ideas generation
- shortlist several ideas / directions for development

Development of Presentation
- assist strategic lead / account lead in developing presentation
- gather research and input into PowerPoint
- run-through presentation with strategic lead / account lead
- contribute feedback, opinions and ideas
- ensure you understand recommendations before meeting

Review Of Work
- review work to see if it meets the brief
- review work to see if your client's point of view & concerns are addressed
- give feedback regarding your opinions based on what you think the client might be concerned about or their reaction to the materials
- review work for consistency and accuracy (spelling / facts)
- ensure mock-ups are made / presentation boards are ready
- ensure a copy is kept for your reference

Presentation Of Approach / Concepts / Creative Work
- prepare projector, speakers and ensure all materials required for presentation are in order
- observer strategic & account leads as they present. listen to the language, the phrases they use, watch how they present concepts. watch how your strategic & account leads observe and react to clients
- note down feedback, comments, client reactions and next steps
- ensure you clearly understand next steps, deliverables and expectations of the clients
- establish timeline for feedback

Amendments / Changes
- complete Progressive Briefs for amendments required
- brief team on next steps and ensure they agree on deliverables & timelines
- ensure team understands client feedback and concerns
- review work to ensure client's feedback and concerns have been address
- check for accuracy and consistency **before** sending to client

Sourcing For Suppliers & Supplier Quotations
- check with creative team on production specifications, paper, materials, finishing
- check existing suppliers for quotation
- when sourcing for new suppliers ensure at least 3 different suppliers are invited to quote (price discrepancies)
- ensure suppliers understand the specs fully
- ensure suppliers are able to commit to timeline and quality expectations
- ensure there are no hidden costs
- communicate costs to strategic lead / account lead as well as finance

Client Quotations
- check all jobs have corresponding quotations (issued by finance)
- ensure any increase in scope of work is reflected in quotations
- ensure all jobs have signed quote and purchase order issued if necessary before proceeding to F.A. & production or HTML development (final stages of project)

Finalisation of Work
- ensure creative team has made all necessary changes and <u>they did not miss out anything</u>
- ensure you have received client OK via email before proceeding
- check for consistency and accuracy

Mock-Ups
- ensure mock-ups are approved by client (anything that requires folding must have a mock-up0
- ensure supplier receives a mock-up

Production
- do production checks with creative teams if necessary
- ensure with creative team that quality, colours and finishing is up to expectations

Delivery (can get production services to assist on this)
- check supplier is on time
- forward Delivery Orders to supplier
- ensure Delivery has been made and let client know

Invoicing
- ensure completed jobs are invoiced by finance
- ensure finance has all 3rd party costs and corresponding supplier invoices
- some suppliers require pre-payments: explain cheque issuing procedures and try to negotiate for payment after production

Filing Of Materials
- close project file with all corresponding briefs / F.A.s / Colour Proofs / Films
- ensure a copy of final material produced is kept by agency

C) THE BASICS OF ACCOUNT SERVICING

1) Organisational Skills

a. Organising large amounts of data
b. Contact Reports
c. Timelines
d. Project Requirements (To-Do-List) / WIP (Work-In-Progress Reports)
e. Summary & Progress Reports (graph & chart format)
f. Ensuring Quotes are issued from Managers, following up with signed quotations, Purchase Orders (ensuring billing information is passed to Finance for invoicing at the end of each month)

Traits required to stand out:
- attention to detail
- accuracy
- speed

2) Time Management

a. Prioritizing
   - knowing what needs to be done first and what can be put off later
   - *example: briefing the creative team first so they have more time to work on a project and then doing your contact reports and other administrative work while the team is working*
     - Urgent / Must Do Immediately
     - Must Do / Can Wait
     - Nice To Do / Do if time permits (do this to impress after completing all the above)

b. multi-tasking
   - ability to do several things at the same time

c. appointments & punctuality
   - always ensure you make appointments for meetings in advance
   - ensure you and your team are on-time
   - if you are even going to be a bit late, call or SMS your client ahead (do not keep them waiting)

d. scheduling
   - the mark of a good account executive is his / her ability to put an accurate and detailed time-line together for every project always make sure your teams are doing work on schedule

   Some tips to help with this:
     - set a time with your team to vet and deliver things
     - set a time with your client on when things will be delivered
     - set a time with your supplier on when things will be delivered
     - allow for extra time in case things go wrong

e. profitability
   - the more changes made on a project and the more time spent on a project, the less profitable it is
   - the key is to get the project completed in as little steps as possible

   Taking note of these areas will help improve your ability in this area:
     - how accurate you are understanding the brief & the communication requirements
     - how accurate you are in briefing the creative team
     - how well you can present and sell the idea
     - how well you understand clients feedback & considerations after initial presentation
     - how well you understand the client and the client's industry

Traits required to stand out:
- ability to develop relationships with the all parties involve and use these relationships to influence scheduling
- ability to help everyone juggle their time

3) Written Communications & Presenting Information
There are two pointers here. One being the basics of written communication and the other being how presenting information in an easy to read / understand way aids in written communication.

Compare the following two options. Which is easier to read and understand?

Option A
a. Documentation of all agreements (contact reports / email summary) and required next steps
b. Clearly stating:
    - **purpose** of each communication piece
    - required action
    - timeline (when next step is due)
c. Structuring communications in a way that is easily read thinking about visual layout through
    - paragraphs
    - headers
    - bullet points

Option B
Documentation of all agreements (contact reports / email summary) and required next steps. Clearly stating purpose of each communication piece, required action and timeline (when next step is due).

Structuring communications in a way that is easily read thinking about visual layout through paragraphs, headers and bullet points.

Traits required to stand out:
- ability to write very succinctly
- ability to format emails, documents & materials so it's visually easy to absorb

4) Relationship Building
Building a relationship with everyone you work with is key to succeeding in this industry. Trust develops with deepening relationships.
a. Relationships with clients
    - reliability = credibility
    - knowledge
    - building trust
    - engaging on a deeper level
b. Relationships with suppliers
    - Difference between treating supplier as partners versus being your slave or the "hired help"
    - Fairness in business dealings

Traits required to stand out:
- ability to win colleagues, clients, suppliers & partners over
- ability to make clients feel you're on their side

D) BEYOND THE BASICS

1) Watch, Listen, Read & Understand

The ability to listen to and understand what is being said or the ability to read and understand emails is something you would think most people who have gone to school can do easily enough but this is not often the case.

Most young communicators fail in this area because they are too impatient to take the time to listen and/or read carefully.

Some older communicators fail in this area because their experience and egos get in the way and they think they know it all.

Pointers:
- listen carefully to what is being discussed and contribute ***in context***
- make an point to understand the reason or rationale behind what is going on, each decision that is made or why things are done a certain way
- understanding the rationale behind things trains you to think on a macro level and the ability to think on a macro level differentiates between the "do-ers" and the "think-ers"
- read emails and correspondences carefully and make sure you understand the history of each particular conversation before jumping in, contributing or asking for something
    - your credibility is affected if you ask for -or- comment on something that has already been covered earlier in the exchange
    - you can make yourself or your agency lose credibility if your actions and comments contradict or go against the recommendations of your colleagues

Being able to listen well and read & understand well are just parts of the art of perception.

A skill necessary for the communications industry is the ability to be perceptive about people, different environments and situations. The sharper your ability to understand people from the different walks of life and put yourself in their shoes, the greater your value as a communicator.

Pointers:
- be sensitive to nuances like:
    - body language
    - tone of voice
    - facial expressions
    - eye expressions
- make watching people and things that happen around you second nature
- learn the discipline of psychographics by striving to understand:
    - what motivates a particular segment of people
    - what affects a particular segment of people
    - what moves a particular segment of people
    - why a particular segment of people are unaffected by certain things
- keep you perceptiveness in balance and be careful to swing to the extremes of being over-positive or over-negative

Questions For Success:
- How quickly are you able to understand things?
- How quickly are you able to piece together and understand situations you get thrown into?
- To what degree do you need to understand the reasons why things are done a certain way or the rationale behind a particular course of action?
- To what degree do you watch people & situations that happen around you?
- To what degree do you analyse things you see?
- How well are you able to anticipate situations?
- How well are you able to anticipate people's reactions?

2) Communicating

In the past, an exchange of any form between two people was an act that was cherished and an art form in itself. Time and effort was spend crafting each response, analysing the possible reactions and repercussions to the different words and tone used.

Most people put paper to pen or vocalise with much less thought in this day and age.

Today's accelerated speed of communications with SMS and emails has further eroded this art and many communicators today have a habit of hiding behind technology.

Account & client servicing is about servicing a client and sometimes the best service is in person.

Given the different channels available to communicate with a client, supplier or partner, different situations warrant the use of different channels.

Some questions to ask are:
- Is it more appropriate to remind a client through email or by SMS?
- Is it better I call the client and talk to her personally or will an email be enough?
- Should we be arranging a conference call or a meeting for all parties or a face-to-face meeting?

Learning to choose the most appropriate medium for communication given each situation will ensure you become aware of social and professional protocol and these are skills that are required as you advance in your career path.

Pointers:
- visit or revisit the art of letter writing and familiarise yourself with the traditional grace of language, protocol, mannerisms & politeness
- choose words and phrases to be used in any form of communication carefully (including SMS)
- take time to craft a response (the operative word here being ***craft***)
- develop & memorise a wide range of words and phrases so calling on this memory bank when needed is easier
- the more time you spend developing and rehearsing verbal responses ahead of situations the better prepared you will be to vocalise when the time comes
- pick up the phone and call your clients, suppliers and partners regularly to keep relationships warm
- use the phone to sort out situations or discuss problems rather than hide behind a SMS and/or email exchange
- follow up all phone calls and agreements with an email to reconfirm all that was discussed and agreed upon
- listen to yourself and be careful about over-using a particular word or words
    - some people use the word "basically" in almost every sentence they speak

Learning to choose the correct channel and craft the correct message in day-to-day communications with clients is the start to the developing of your abilities to choose the correct channels and help craft the correct messages for campaign.

Part of crafting each response is also knowing the various styles of language available. Learn to use the language style of suggestion. This style is often less confrontational and receives a warmer response. Examples of this are:
- *… can I suggest …*
- *…. do you think it might be better to / if …*
- *… would it be possible to …*
- *…. can I trouble you to / for ….*
- *… what is your opinion on …*

Questions For Success:
- Do you see your client at least once a week or do you prefer less client contact?
- Would you rather email and/or SMS a client or pick up the phone to call and talk to a client?
- Do you know when to communicate with a client via email, via SMS, through the phone or face to face?
- Are you aware of the different styles of language and do you employ these different styles when you communicate with you client?

Note: The greater your personal client contact, the better your relationship with your client and the better your management of your projects.

3) The Art Of Presentation

Presenting a piece of work, a series of concepts or walking through a 30 slide PowerPoint presentation can either be dreadfully boring or supremely entertaining. The art of presentation is similar to the art of theatre or the magic of cinema.

Being able to present well is often half the battle won. The other half is whether what you present has substance and depth.

Good presenters are able to:
- capture the attention of their audience (personality, posture and voice)
- quickly understand and be able to gauge the audiences' responses (power of observation)
- be able to speak in a manner and language that their audiences identify with (ability to craft messages that engage)
- know which buttons to press

Good presentations rely on:
- structure
- visual stimulation (add colours, header blocks, dividers, tables, charts, movement – be careful about overdoing movement / slide animations)
- audio (if possible)
- pace (vary the speed of the presentation, how long you show each slide, how much you talk about each item)

4) Knowing Which Buttons To Press

Communicators need to learn to be sensitive and perceptive about all kinds of things. Learning to think like a customer and the ability to correctly gauge how a customer will react are like super-powers in this industry.

How far and how quickly you progress upwards in the corporate climb depends on how perceptive you are to people and the things they interact with. Every channel that comes into contact with a customer has an effect on the customer. Thus each channel becomes a "button" which you can use to either positively or negatively affect a customer.

How customers look at packaging or a shelf-talker is as important as how customers surf a website, respond to a print ad or talk with a customer service representative over the phone. Each channel is never an experience in isolation. The more you are able to keep the various channels in mind and consider each's roles in influencing customers, the better attuned are your super-powers.

To improve your abilities in this area, you should try the following:
- watch people as they react to things
- talk to people
- read what people are saying through articles / online journals / blogs / tweets
- learn to think and feel like other people

One of the best ways I've found to get an understanding of customers which has some depth is to conduct multiple choice question surveys and one-to-one interviews with target audience segments. Even speaking for 5 minutes with a few individuals will give valuable insights and intimacy with the target segment. These surveys and discussions will help you in better knowing "which buttons to press".

5) A Note About Difficult Clients

I get asked this a lot so I thought I'd share a few pieces of advice to cover this.

There is no sure-fire way to deal with a difficult client and it's always advisable to speak with you manager or mentor on dealing with difficult situations.

Here are some suggestions:

a) Spend more face-to-face time with them. Hiding behind emails and refusing to speak or see them may often worsen the situation.
b) Understand where they are coming from and what pressures they face.
c) Ask specifically what the issues are and be prepared to deal with them promptly and cleverly.
d) Being able to solve their problems and the issues they have immediately often decreases the client's frustration. This may require empowerment from your manager.
e) Be prepared to acknowledge mistakes, apologies and take responsibility for them.
f) Take the initiative, take on responsibility even if it's not yours. Given them your word.
g) Ensure they receive a solution in a timely manner and keep in constant contact with them.

Hope this document has been helpful. If it has, drop me a note on my blog at http://jermyntoh.com