



SEQUOIA SYSTEM INTERNATIONAL

Relationship Manager *Program Agenda*

Day One

Session 8:00 am – 5:00 pm

I. First Thoughts

- Excellence is a Front-End Decision
- Program Objectives & Format
- Our Understanding of Your business Objectives

II. Time Management for Account Managers

- Prioritizing Your Responsibilities
- Allocating Time: Guidelines and Best Practices

III. Segmentation and Planning with External Clients

- Developing an Ideal Client Profile
- Defining a “Balanced Relationship”
- Differentiating Levels of Service
- Allocating Time

Lunch

IV. Planning with Internal Clients

- Defining a “Balanced Relationship”
- Determining Level of Service
- Motivating the Team – Four Critical Questions to Answer
- Allocating Time

V. Best Practices in Client Management

- External Client: Reports and Procedures
- Internal Client: Reports and Procedures
- The Perfect Day

Day Two

Session 8:00 am – 3:00 pm

I. Refining Your Performance Measurement System

- A Process for Ranking Client Performance
- A Process for Evaluating Your Performance
- Building the Scorecards
- Connecting the System to Objectives and Compensation

II. The Sales Process

- The Process Defined
- Meeting Objectives and Action Steps – the Enhanced Relationship

Lunch

III. Building Your Action Plan

- Define the opportunity and objectives
- Establish the sequence of action steps
- Assign accountability
- Allocate time

IV. Program Review and Installing the Plan