

Do you *really* know what's happening in your client accounts?

🕒 6 minute read

Client reviews are critical when it comes to retention and growth. They're the most important event in a contractual relationship – a supplier's chance to shine.

This article takes a look the visibility and input supplier leaders tend to have during and after client reviews, and how introducing specific measurements into the process could improve these relationships for the long-term.

Let's take a look at some of the most common questions asked.

Which client accounts are at risk?

What generally happens: Most supplier leaders don't have time to attend every single client review. Yet, without a means of measuring the outcomes of reviews, they won't have visibility over which accounts are doing well and which are at risk – and should prepare themselves for unwelcome surprises in the future.



A new approach to client reviews: If supplier leaders have access to a dashboard clearly showing the status of all client accounts, based on customer feedback from each review, they can mitigate risk before it becomes a problem.

Which account managers are performing (and which aren't)?

What generally happens: Many account managers work incredibly hard, believing they have covered all bases and are doing a top job. However, perception and reality can be two very different things. Without a way to measure what customers really think of their account managers, supplier leaders are clueless – often only discovering there's a problem once it's too late.



A new approach to client reviews: By giving clients the ability to provide direct feedback on the strength of the account management relationship – as part of the review process – supplier leaders gain a clear understanding how each team member is performing.

Is the client getting the level of attention they want from the leadership team?

What generally happens: Although most supplier leaders would like to have more time with their clients, it's just not possible. So, when it comes to reviews, what typically happens is they only join in when there's a problem or the renewal is due – which can make clients feel increasingly marginalised and frustrated.



A new approach to client reviews: Giving leaders a practical way to communicate and stay close to their clients on an ongoing basis makes these relationships infinitely better. This means, at the time of each review, they have a voice – whether that's recording a personal message or giving the client the opportunity to meet relevant individuals from the supplier's business.

What does the client really think?

What generally happens: Supplier leaders rarely see feedback from their clients, which means they have no idea what they really think. This doesn't just lead to frustration; it often leads to churn as well.



A new approach to client reviews: Making sure leaders are automatically notified about any dissatisfied clients, and can access all relevant feedback quickly and easily, allows them to take action when required.

Did the review happen?

What generally happens: Naturally, supplier leaders like to stay in control of their customer accounts, and don't want to discover a review hasn't taken place a long time after the event. However, without a means of monitoring what's happening on a day-to-day basis, this remains a concern. If the company doesn't do reviews, they run the risk of losing their contract.



A new approach to client reviews: Ensuring leaders have a clear picture of when the last review took place - with red flags against any account where a review hasn't happened within an agreed timeframe - gives them full oversight and control.

Did the review meet expected levels of quality?

What generally happens: Knowing a review has happened is one thing, but most supplier leaders are rightly obsessed with quality. Without a way of tracking what was covered during the review, leaders are kept in the dark – and account managers cannot be held accountable nor have their work checked to ensure it meets the expected quality.



A new approach to client reviews: If leaders have full and immediate visibility over the content covered in every review, they can ensure it meets the quality they expect from their teams.

Who attended the review?

What generally happens: Far too often, reviews only involve an account manager and their key contact.

This presents a problem as all the great work being done by a supplier may well not be being recognised across the business.



A new approach to client reviews: Each review should reach at least five, ideally 10, key contacts across different levels of the account. If supplier leaders have one place where they can genuinely see which contacts are engaged and giving feedback, they know when they need to step in and when they can rest assured the account is in safe hands.

What are the meeting actions?

What generally happens: Most supplier leaders are focused on getting things done and become frustrated when there's no clear progress. This is particularly important following critical reviews: if actions aren't managed, logged or closed, the account will stall.



A new approach to client reviews: At the click of a button, both leaders and account managers can see each account's specific closing actions to determine which are in the green and which are in the red. Actions help retain and grow contracts; full visibility gives the supplier the information they need to make this happen.

A new level of clarity in client reviews

Clientshare Pulse is the business review workflow tool that gives supplier leaders visibility, consistency and control over all their accounts.

Robust client reviews are a vital for a wealth of business-critical reasons, from **meeting SLAs and KPIs**, to **showcasing innovation** and **improving customer satisfaction**. With the direct insight and oversight provided by Clientshare Pulse, leaders can retain strategic control, manage risk and nurture strong business relationships for the future.