

Client Relationship: Do you care?

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What is our definition of relationship management?

- Behaviour
 - Vision
 - Values
 - Vocabulary
- Integrated corporate services
- Everyone is a relationship manager

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Generic model of relationship management

Organization Strategy

People and Processes

Technology/
Knowledge Management

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Adapted from Businessweek.com article

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There are many relationships

- Facilities and client
- Facilities and staff, consultants
- Client and occupants

- However, don't antagonize the customer with many points of contact

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Traits of a successful relationship manager

- Visionary
- Planner
- Results Oriented
- Committed
- Hands-on
- Focused
- Responsible
- Team Builder
- Good Communicator
- Decisive
- Responsive
- Contagious
- Respected
- Intelligent

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From: Construction Executive Online website




Why should you care?

- Client satisfaction
- Protect the reputation of your organization and that of your client
- Be able to anticipate customers' need and behaviours
- Be able to understand the value of the customer to the organization

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Future of relationship management

- Models – Dynamic
- Strategy
 - Staying connected to corporate strategy
 - Shifting strategic relationships
- Need to be based on current and changing cultures

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Our relationship

- André Audette
 - Director of Facilities Services at the Bank of Canada
- Meredith Thatcher
 - President of Carroll Thatcher Planning Group
- We have worked together for over 10 years

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Bank of Canada case study

- What the Bank does...
- Stakeholders
 - Core business departments
 - Corporate Services
 - Facilities
 - IT
 - HR
 - Knowledge Management
 - Security
 - External partners

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The distant past...

The diagram illustrates a formal structure. On the left, a stick figure is connected to a triangle labeled 'Facilities'. Below it, another stick figure is connected to a triangle labeled 'IT'. On the right, a larger stick figure is connected to a stack of triangles labeled 'Departments'. Double-headed arrows labeled 'Formal' connect 'Facilities' to 'Departments' and 'IT' to 'Departments'.

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The past...

The diagram shows a central 'Broker (RM)' represented by a stick figure. To the left, under 'Non-core depts', are 'Facilities', 'IT', 'Security', and 'HR'. To the right, under 'Core departments', are 'Dept A', 'Dept B', 'Dept C', 'Dept D', and 'Dept E'. Arrows connect the Broker to each of these departments, indicating a central role in managing relationships.

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The present...

The diagram shows a more integrated structure. On the left, under 'All departments', are 'Facilities', 'IT', 'Security', and 'HR', each with an 'RM' (Relationship Manager) role. On the right, under 'All departments', are 'Dept A', 'Dept B', 'Dept C', 'Dept D', and 'Dept E'. Arrows connect each 'RM' to each department, indicating direct, multi-directional relationships.

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▼ The future...?

Facilities/Security

IT

HR

Departments

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▼ The Bank's compass

- “We take our bearings from our commitment to Canadians, to excellence, and to one another.”

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▼ Our commitment to one another

- Communicate clearly and openly
- Share knowledge and experience
- Develop our talent and careers
- Recognize those who live up to our commitments
- Respect one another and our lives outside work

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▼ Corporate Services' vision

- Partnerships: “building even stronger partnerships with our clients”
- Delivery: “mastering new ways of delivering our services”
- Expertise: “continuing to build our consultative and professional expertise”

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The Bank's principles of relationship management

- Trust
- Vision
- Understanding of organizational environment
- Flexibility
- Vulnerability
- Transparency
- Respect

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Interactive session

- What additional principles can you identify?
- What are the symptoms of a breakdown in relationship management?
- How do you make it better?

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Rememberknow what motivates people

- Determine the 'profit' motive held most important by each person and work hard to help them achieve that 'profit'
 - Social
 - Self-actualization
 - Value system
 - Financial
 - Technical
 - Enjoyment
 - Educational

From: Project Partnering for the Design and Construction Industry by Ralph Stephenson

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