

managing clients + managing projects: may 20, 2019.

room for only  
24 attendees

a new seminar intensive from  
**recourses: david c. baker**  
nashville, monday, may 20, 2019



a gathering of disciplined + courageous + intelligent marketing practitioners



eager to wrap their expertise in excellent client management + project management



# to justify a price premium + to do more effective work. like you.

Savvy firms know that clients are far more likely to notice poor customer service and deficient project management long before they notice subpar effectiveness. It's no excuse for sloppy work, of course, but if you can wrap great work inside strong client management and project management, you'll have the best of both worlds.

These two elements could stand to have a separate event for each, but they are so closely intertwined that it makes sense to cover them both together (although the best firms use separate personnel for the two functions). So we'll cover all the important elements of both, but we'll also explore the relationship between the two and what strengths are unique to both.

Here's a simple three-part test for effective client

managers. How early can the new business department hand off a warm lead to an account manager to close the first project in a long and prosperous relationship? How effectively do the account people grow their accounts over time? How well do client managers manage tense situations with presence and grace? These three scenarios—if handled well—point to a strong account executive who can effectively do what may be the most difficult in an agency: straddle the fence between advocating for the client and advocating for the agency.

The project management department, on the other hand, is responsible for six functions of varying importance: objective pricing, capacity prediction and management, integration of outside resources, quality control, use of hours in

the budget, and deadline compliance. It takes a very specific personality profile to comfortably do this exceedingly well over time. It also requires a unique and positive commitment to advanced project management.

This one day will change how you see everything about these two roles. We'll start with understanding the overall structure of the roles and how each department interfaces effectively with other departments, noting the nuances that help build cooperation.

Then we'll look in detail at the specific job descriptions of

each role, and you'll be a little surprised at what you should and should not be doing.

Next we'll examine workflow and how it overlays an appropriate understanding of the related roles. How do you shift an internal environment from deadline-driven to profit-driven? Many firms are leaving hundreds of thousands of dollars and the table and letting things slip through the cracks. There are best practices related to this that are helpful to understand.

Then you'll get together with fellow attendees for a nearby lunch (on your own) to compare notes and connect for further sharing after

the event, including some possible on-site visits to learn from each other.

We'll also need to explore objective pricing, which is at the center of a strong Resourcing (what we call project management) function. You can lead the firm to be a high-performing when you nail this expertise.

Then we'll flip to the other side and review the very specific elements of treating clients the way they say that want to be treated. This data is based on thousands of client interviews, compiling the clearest signals for top-performing firms.

Following on that theme, and based against a background of fully satisfied clients, we'll look at a few key strategies to grow your best accounts. Qualified account people do grow accounts effectively,

and that's part of what makes them so valuable to creative firms.

Finally, we'll look very specifically at how to manage tension—healthy and otherwise—to maneuver personnel roadblocks and enhance your personal effectiveness.

This is a newer seminar and this is only offered once or twice per year. It is also limited to 24 attendees to improve the quality of the interaction and leave as much time for discussion and questions as possible.



# the right people + the right inputs = remarkable results

## MONDAY, MAY 20

- 9:00 to 9:30 Introduction and Introductions
- 9:30 to 10:30 Overall Structure of the Various Roles Individually
- 10:45 to 11:30 Deeper Dive Into Client Management/Project Management Roles
- 11:30 to 12:15 Overlaying Workflow on Both Roles
- 12:15 to 1:15 Lunch with Fellow Attendees, On Your Own
- 1:15 to 2:00 Pricing Effectively
- 2:00 to 2:30 How Clients Want to Be Managed
- 2:45 to 3:30 Growing Accounts
- 3:30 to 4:00 Understanding How to Work Well with Other Departments

## PRICE

\$1,200 (strict limit of 24 total attendees)

Payment due in full at registration. Tuition fees are non-refundable. Substitutes welcome at any point, though, and registrations can be transferred to any event within one year. Travel and accommodations and meals are not included. Multiple attendees from the same firm should each complete an individual registration. Pay for two; bring one for free. No discounts for subsequent events, unfortunately.

## ACCOMMODATIONS

We aren't holding a room block, but there are many hotels near the venue.

## REGISTRATION

To register, please follow this link:

<https://www.eventbrite.com/e/managing-clients-managing-projects-registration-59471402566>



# behind the scenes

## DAVID C. BAKER

Understanding marketing is a pursuit of endless depth because it involves an attempt to understand elusive Humans.

Flying airplanes and helicopters gives me context and perspective.

Capturing images tops off my artistic soul and expresses it more kindly.

Music theory and vocal performance majors merge math and linguistics.

Growing up with a

Mayan tribe incorporates anthropology and history.

Learning eleven languages and theology leaves me loving language.

Visiting thirty plus countries helps me define

“best” in different ways.

Consulting is something I understand as meaningful conversations, appropriate venues for applying intellect, and the helpful pressure to articulate.

I see myself as part researcher, part scientist, and part educator. In that role, I have worked with 900+ firms around the world, just like yours.

This seminar is planned, delivered, and owned by ReCourses, Inc., the vehicle through which David C. Baker provides business insight to expert marketing firms as an author, speaker, and advisor.

Images + Copy + Design, using Frutiger LT Std. ©2019 ReCourses, Inc. All rights reserved.

