

How Effective Are Your Relationship Managers?

In evaluating the effectiveness of your client relationship managers, here are some questions you should ask yourself:

1. Are our relationship managers setting high aspirations for the client relationships they are responsible for?
2. Have they built relationships with key executive decision makers—with economic buyers and who can authorize your firm’s work? Or are their best relationships with middle managers?
3. Does the client perceive them as thought leaders?
4. Are they “agenda reacting” or Agenda Setting? Do they have a seat at the table with senior clients? Are they helping to shape, influence, and improve their client’s agenda of critical priorities and goals?
5. Do they try to sell to clients or do they create buyers by identifying client problems and opportunities and building trust in your organization’s ability to address them?
6. Do they consciously strive to build many-to-many relationships between your firm and the client’s organization? Are they gatekeepers or door openers?
7. What is the balance of their effort and time as between managing the delivery of current projects versus developing and deepening the client relationship at senior levels and bringing strategic points of view and perspectives to the client? Are they project managers or relationship managers?
8. Do they use a reflective, strategic account development process that focuses on ongoing dialogue about the client’s needs and priorities and the key relationships that have to be developed by the team?
9. Is value defined as delivering the project or program as promised? Or doing that and more—e.g., helping the client improve their business in multiple ways and grow personally from the experience of working with you.
10. Do your client relationship managers have strong internal networks of relationships, so that they can identify and mobilize the right people from your firm into their client relationships?
11. Do they build strong teams? Do young professionals gravitate towards working for them and getting involved in their projects?
12. Are your relationship managers collaborative? Do they spread the credit for successes around liberally to other team members? Do they set the example in the way they work with others and do they consistently communicate collaborative values and behaviors?
13. Do they engage in ongoing personal development to expand their skill base and enlarge their comfort zone?
14. How many of your relationship managers are individuals that c-level executives would really want to spend time with?

