EFFECTIVE CLIENT ENGAGEMENT

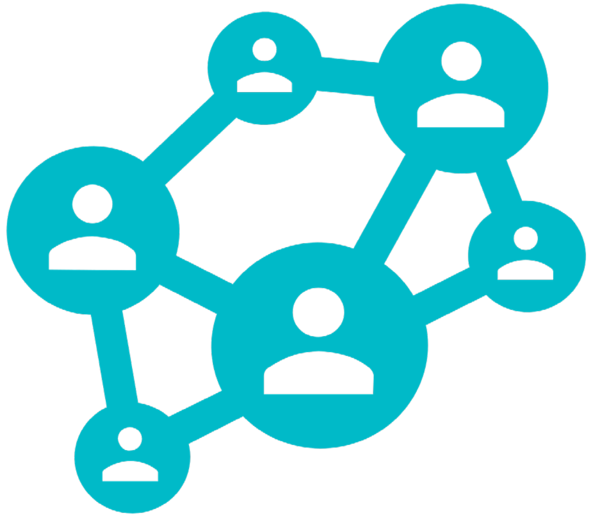
Workforce Team Meeting

October 2023

WORKFORCE CONSULTANTS

How Do We Identify Potential Clients?

- Lots of Business Development Efforts!!! (Ask August and Greg)
- Marketing Campaigns – Vanessa has become our infographic specialist !
- Professional Networking - Leadership team – trusted advisor referrals
- Client Referrals



- Our focus for 2024 it to be more selective to determine which clients may be beneficial for us to engage with and determine if we can adequately meet the potential client's needs.
- During the sales calls we try to determine if the prospective client would potentially be a good client for us and whether we are the right option for them
- We recommend which program option may be the best choice to meet the client's needs and their budget
    - Fractional HR (Minimum 25 hour/wk onsite HR support) – Current clients in this program include Yakult, Beacon Day School, Little Sisters and Bio Nutraceutical
    - Flex HR – most common option selected by client
    - Fixed Rate – best option for project work only
    - Subscription/Advisory – Provides up to 5 hours /month for a low flat rate - they call us only when they need us

We have a new client!

(now what do we do?)

Important First Steps

- Get to know the new client (BD input, company's website, Linked In)
- Review the SOW
- The kick-off meeting
- Welcome Kit
- Assignment of Primary Consultant

The Kick-Off Meeting

In Person or Virtual?

Focus on creating relationships with the new Client

Confirm expectations for initial work to be performed

Establish expectations for support

Discuss Workforce billing and invoice processes

Initial Impressions Count!

After the Kick-Off

The goal should be to complete all of the required initial steps within one week of signing the agreement.

The Welcome Kit

Request for Documents to be Reviewed to start the Process Review Audit

Schedule First Check in with client

HR Process Review (Audit)

Optional for Client but highly recommended to identify compliance gaps at the start of a client engagement

Survey Template in Zoho Survey

May require onsite review of documentation if not available electronically

Generally sampling of files is okay but a more in-depth analysis may be required

HR Process Review (Audit)

- An effective audit takes extensive time to complete
    - Less than 50 employees (up to 20 hours)
    - Less than 100 employees in one location (up to 40 hours)
    - More than one worksite in multiple states (up to 200 hours!)

- Convey expectations to your client and communicate regularly throughout the process

- If you find major compliance issues let your client know immediately and help them mitigate the risk.

Audit is complete…

- Plan to discuss findings with Sr. Leadership member (Rachel or Andrea)
- Create deck for presentation
- Develop strategic action plan that defines clear roles and expectations for the work that will be performed by Workforce versus the client
  - Priorities
  - Targeted Delivery Dates

Maintaining Effective Communications

Key Point

How do you communicate with your clients?

- Communicate clearly and often.
- Use plain language; avoid legal jargon and acronyms
- Be proactive, keep your clients updated on project status

Client Activity Update

New Requirement for all W-2 Employees

FOCUSES ON PROVIDING REAL-TIME UPDATE TO CLIENT THAT DETAILS WHAT WORK HAS BEEN COMPLETED FOR THE PAST WEEK.

FULL VISIBILITY OF HOURS WORKED – AVOIDS "STICKER SHOCK" WHEN INVOICES ARE MAILED OUT.

FIRST REPORTS WILL BE DUE ON TUESDAY, NOVEMBER 7

CALENDAR REMINDERS WILL BE GENERATED

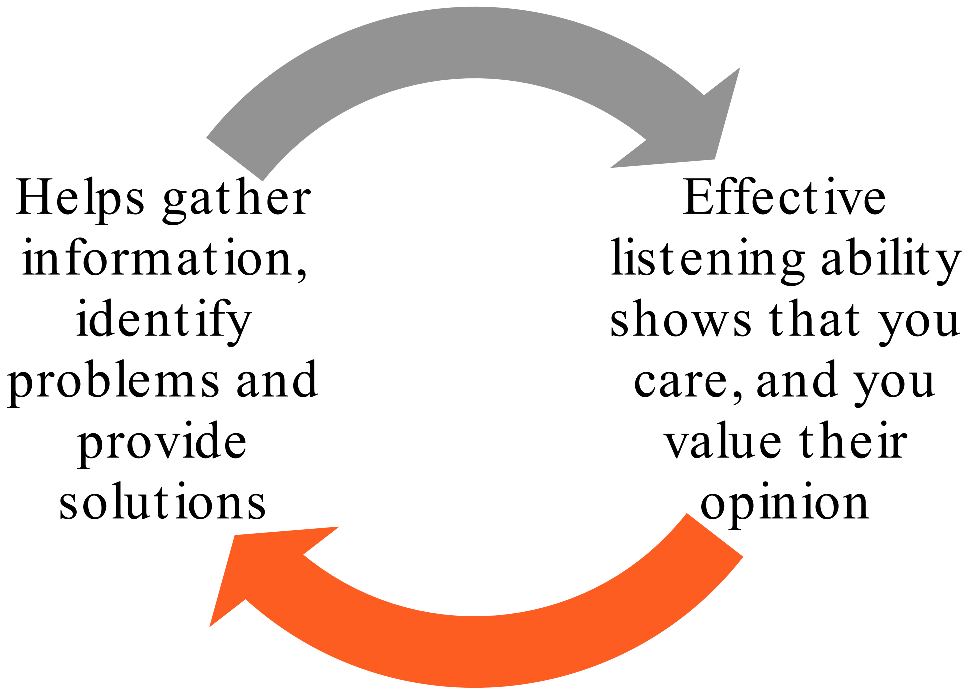
Critical Interpersonal Skills

Being able to relate to your client and convey that **their** concerns are a priority for **you** is essential for maximum client satisfaction.

- Empathy
- Respect
- Professionalism
- Verbal vs. non-verbal cues
- Ask open ended questions

If you are managing multiple clients, ask us for help if you need it. Your Workforce team members are available to collaborate with you and help you stay on track with your client's deadlines.

Critical Listening Skills



Key Point

Document your Recommendations

Anybody have difficult clients?

Communication Problem Zones What do you do?

- Client won't respond to questions stalling work in progress
- Client is looking for ways to avoid compliance
- Client has decided not to pursue your recommendations
- Client is not responding to questions about payment of invoices
- Other obstacles?

On-Going Client Engagement

Strategic HR Focus

Support Complex People Issues
- External Claims
- Critical Hiring
- Employee Investigations

Suggest Employee Surveys

Get to Know all of the Workforce Offerings
- LMS (Mineral)
- Supervisory Academy
- Professional Coaching
- Safety & Health Services

Other Strategic Methods

Focus on Lessons Learned Approach

Use Root Cause Analysis Methods

- The 5 Why's

Plan for an Annual Recap - provides opportunity to meet with your client and agree on other projects/programs that can be supported by Workforce

- Key Accomplishments
- New Compliance Requirements
- Changes in their Business