



Institute
and Faculty
of Actuaries

Why Does Client Management Matter?

John Reeve

02 December 2013



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**Client
Management**

John Reeve
Senior Consultant

Doing what comes naturally



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Plan for the session



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Plan for the session

What is Client Management?

Why is Client Management Important?

Tricks of the trade

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Who is your client?



What does good service look like?



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What is Client Management?

competitive opportunities clients essential competition
developing along customer-facing products between
management account needs executives
experience decisions trusted accounts features customer
company's analyze identified
gain take expectations sales identify build bachelor's
finance skills Relationships members brief extensive
analytical meet other commitment increase technical Good
face use assess according loyalty activities honesty deep
improve including Planning help explain service advisers create
becoming company reliability
industry challenges arrangements set Coordination important manager key any
commercial closely directors development make degree
barriers business friends managers
strengthening based Bureau senior highest revenue relations purchasing knowledge

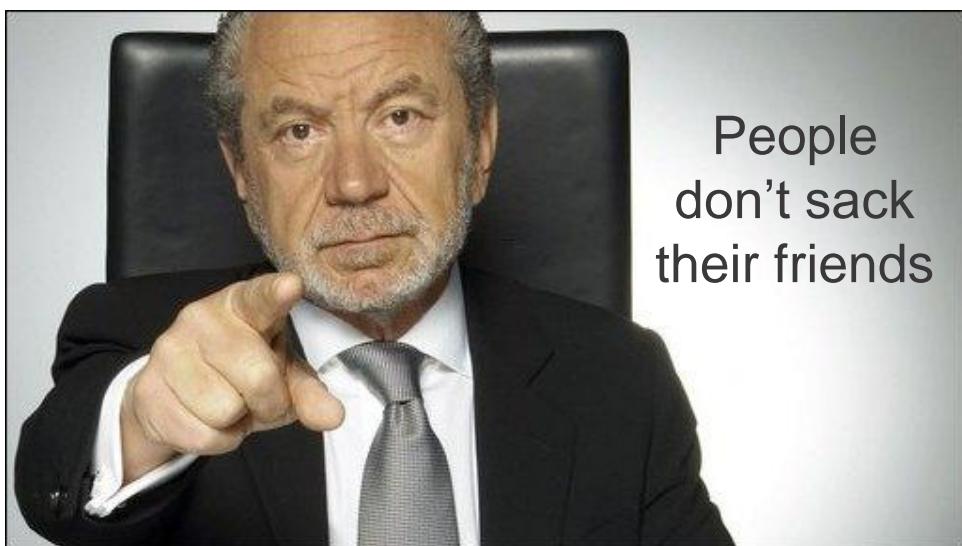
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John's Maxim #1



John's Maxim #2

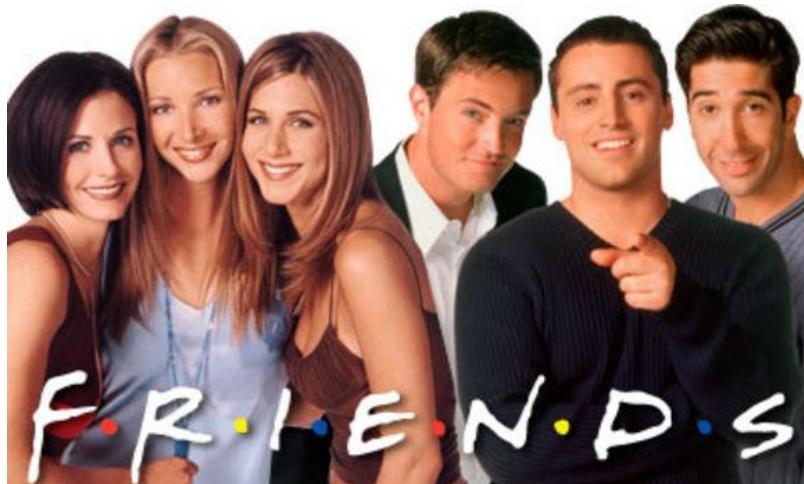
Brownie Points!



Brownie Points buy you the chance to make a mistake

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John's Maxim #3



...are more fun to work with

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John's Maxim #4



Client
Management
is important
but rarely
valued

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John Reeve - United Kingdom | LinkedIn
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 John Reeve, Senior Consultant at Premier Pensions Management. Location: Bristol, United Kingdom; Industry: Financial Services ...

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 John Herbert Head of Actuarial Services Premier Pensions Management, Jay Solanki Head of Consulting Services Premier Pensions Management, Dan Taylor

John Reeve | The Pensions & Benefits Show 2013- 12 & 13 June ...
www.pensionsandbenefitsshow.co.uk/speaker/john-reeve/ ▾
 John Reeve is a Senior Consultant at Premier where he focuses on advising Trustees and Sponsors on the management of their pension arrangements.

Premier reshuffle sees Reeve and Solanki in new roles
www.professionalpensions.com/_pensions/_/premier-reshuffle-sees-reeve... ▾
 6 Sep 2013 - ... to make Jay Solanki head of consulting as John Reeve takes the helm ... The pensions, benefits and actuarial firm promoted Solanki to allow ...

Inaugural mallowstreet Awards wows Pension Industry - Actuarial Post
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John Reeve

 Senior Consultant at Premier Pensions Management
 Bristol, United Kingdom | Financial Services

Current	Senior Consultant at Premier Pensions Management Ltd Director and Trustee at Curzon Cinema, Clevedon
Past	Trustee at Raising Standards of Pensions Administration Client manager at MNPA Administration Director at Jardine Lloyd Thompson see all -
Education	Bristol University Abbs Cross School
Recommendations	1 person has recommended John
Connections	500+ connections
Websites	Company Website Curzon Cinema Blog

John Reeve's Summary
 Pensions Expert with wide experience of all aspect of corporate pensions advice and delivery.
 I pride myself in pragmatic solutions to complex issues and to helping companies come up with the right solution for their business and not the one which is best for me or my Company.
 Currently working on a number of pensions consulting issues in all areas of Pensions.

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John's Maxim #5



...there is no excuse for not
knowing your client.

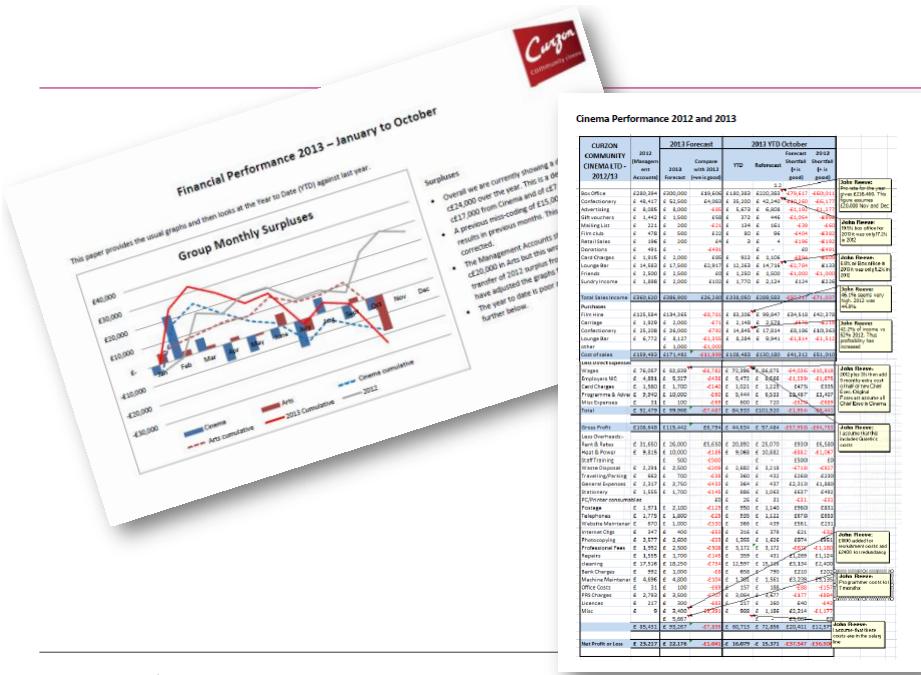


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Speaking Their language

- Technical Issues
 - Analytical v Pictures

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Speaking Their language

- Technical Issues
 - Analytical v Pictures
- Tell a story
- Pictures and physical demonstrations work

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John's Maxim #6



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John's Maxims



Client Management is important but rarely valued

Brownie points allow you the opportunity to make mistakes

Brownie Points!



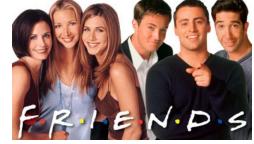
People don't sack their friends



There is no excuse for not knowing your client



Friends are more fun to work with



Even if it is complex you can still be entertaining

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Thank you for your time

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Questions

Comments

Expressions of individual views by members of the Institute and Faculty of Actuaries and its staff are encouraged.

The views expressed in this presentation are those of the presenter.