



IS IT TIME TO CHANGE YOUR CLIENT RELATIONSHIP PARTNER?

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For professional services firms, a good client relationship partner (CRP) is worth their weight in gold. I mean that literally. The right CRP in the right role really can be the difference between having a happy client who wants to keep using your services whenever they can and a disgruntled one who starts looking elsewhere.

In large, multi-service or multi-site client relationships the CRP role is the fulcrum for the client's relationship with the firm. In fact many big buyers insist on firms identifying their CRP in tenders.

But every CRP should come with a life expectancy and, quite frankly, I don't think it should be a very long one. If you're not regularly changing your CRPs and bringing in new blood you're not just doing a disservice to your firm and the careers of your people, you're also opening yourself up to risk.

So when's the right time to ask a CRP to step down?

Well, before we get to that it's probably worth thinking about what the point of a CRP is and what they're supposed to do anyway.

THE ROLE OF THE CLIENT RELATIONSHIP PARTNER

The CRP is a role of stewardship and a vote of confidence from peers. The CRP is the person who acts as a go-between from client to adviser and vice-versa, the partner who stays in regular touch and smooths over the bumps, the one who connects the work that needs to be done with the people who can do it.

You shouldn't have a CRP for every client but you definitely should have one for your best clients - the ones who make a material difference to your bottom line. Depending on the size of your practice this might be the top five or 10 money generators. You probably should also appoint a CRP for any client who uses multiple practice groups within your firm, as well as the ones that are important to your reputation.

When things are working well, or even just functioning adequately, it can be tempting to keep the same person in the CRP role for as long as possible. But there are good reasons to keep it fresh and keep changing things up. Here are six times I think you should be moving your CRP on and putting someone else in the role.

1. THEY DON'T LIKE WHAT THEY DO ANYMORE

Being a CRP should be enjoyable: a chance to step away from behind the desk and take on a different kind of role, a chance to do something a little more social. But sometimes being a CRP can become a chore.

After time CRP's can find that they're no longer as enthusiastic as they once were (after all, not many of us can stay focused on one thing forever). They may find they don't really click with the client, that they become sick of difficult personalities or petty demands. They may find that they're not achieving what they want to or they're



spread too thin, or that key account plans have been overlooked. They may find that they'd simply rather take on another account or just get back to billing.

When that happens, and a CRP begins to get bored or frustrated, it also begins to show. The phone calls become less regular, the relationship goes stale and, pretty soon, the client starts looking elsewhere. Time to ask the CRP about their satisfaction with the role.

2. THE CLIENT HAS CHANGED

Sometimes, however, the change is at the client's end. The personnel turns over or the company takes a new strategic direction and wants different kinds of advice from different kinds of advisers. Increasingly, also businesses and government organisations move buying decisions away from their traditional buyers and into the hands of procurement. And that requires a different relationship altogether.

When this happens, you may find that your CRP is no longer the right kind of fit. Best to move them along and put in someone better suited.

Of course the best way to stay in front of changes with your client's expectations is to ask them through your regular (at least annual) [Client Feedback discussion](#). Remember this is the discussion about the overall relationship on both sides (and not to be confused with transactional feedback or assessment of a matter).

3. THEY'D BE BETTER OFF WORKING WITH ANOTHER CLIENT

Just as every professional has their quirks, every client does too. Not every CRP is right for every client. Some may like the extravert; others the introvert. Some may work best with the high touch, face-to-face operator, others may like the CRP who keeps a lower profile. Most importantly, some may want a particular kind of advice or particular types of advisers to the exclusion of others.

You can't take a 'one size fits all approach' to appointing CRPs. Sometimes, through no fault of their own, your partners may be well suited to managing some clients and ill-suited to others.

So rotate your CRP's to match their strengths with client's business needs and future expectations, not whether they went to school together. For instance, you may have a partner who's particularly good at working with clients working in turbulent environments, or someone who's great at working with clients in high context, hierarchical cultures.

4. THEY'RE ON TOO MANY ACCOUNTS

It can be tempting to put that affable partner that everyone likes onto as many clients' accounts as possible. But, in my view, there's nothing worse than giving your CRP too much to do. With a lot of clients on their plate they won't be capable of putting in their best work every single time. You'll also be exposing yourself to unnecessary risk (more on that later).

If one of your partners has too many clients*, it's time to get them off a few accounts. Work with them to figure out which ones they want to drop and let someone else step into the fray.



*[*Large professional services firms expect a Partner to invest around 200 hours per annum for each CRP role]*

5. A SUCCESSOR IS WAITING IN THE WINGS

Speaking of which, a CRP partner should never be acting in isolation. They should have the support of a team and no-hassle access to additional resources and funds. This includes access to your BD people and, most importantly, a deputy or shadow CRP.

Just as every dog must have its day, every deputy CRP should, at some point, step up to the role of CRP. So if you have a ready-made successor waiting in the wings, perhaps it's time to let them play the main game. In the process, you'll be widening the talent pool and showcasing the bench-strength that gives you competitive advantage.

6. THEY'VE BEEN THERE TOO LONG

Most things grow stale after a while and client relationships are no different. We change, our businesses and practices change, our client list changes and the clients themselves change. Personnel and personalities change too. If your CRP has been in the same role more than five years, chances are they've shuffled through a cycle or two and the relationship may not be as sharp as it once was.

In the interests of your own long-term sustainability, don't let one partner stay in the CRP role for as long as they want. Impose a time limit of, say, four years, and let your clients know. After all your clients will be very familiar with risk management practices like their [Auditors rotating off every five years](#).

They may even appreciate not having to ask for a CRP re-fresh.

FROM LADDER TO LATTICE

Moving on a CRP is only part of a good Client Management System (CMS). Having deputy CRPs in the wings is great but it shouldn't be all or nothing. Today's firms no longer embrace those 'up-or-out' career ladders. Instead the lattice structure, with sideways moves, gives more rewarding options in the roles of your firm's CMS structure.

Being able to adapt CRP role intensity and encourage versatile leadership, plus having meaningful functions for those rotating through CRP roles, is all part of good career and client management.

IN SHORT...

A great CRP is an asset to your firm and someone who can ensure your practice's continued profitability, but the role should be reviewed - not rusted-on.

So with that in mind, ask yourself whether now is a good time to move along some of your CRP's. And then get about the task of doing it. Your practice and your people will be thankful in the long run.



FURTHER READING

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