Cross-selling and referrer management accelerator

Intermediate level

Every professional service firm knows that cross-selling makes sense yet so few manage to maximise the potential of internal referrals. Some practice groups are almost entirely reliant on referrals from external organisations – how do they get more from existing referrers and generate work from new referrers? This session offers delegates the opportunity to share experiences and develop new approaches to accelerating their referrer management programmes.

The workshop qualifies for 3.5 hours CPD.

Topics covered

Why choose PM Forum training? See overleaf...

Introduction

- Delegate and session aims
- How important are referrers? - Analysing the source of work
- Relationship marketing – the role of marketing and business development teams
- Setting clear goals

Cross-selling – internal referral management

- Barriers to cross-selling
  - Client perspectives
  - Internal structure and motivation
- Internal collaboration – culture, policies, rewards and information systems
- Measuring results
- Towards Key Account Management (KAM) and sector approaches
- Exercise: Developing a focused cross-selling campaign

External referral management

- Working with different types of external referrers:
  - Clients
  - Other professionals (lawyers, accountants, surveyors)
  - Charities and other businesses
  - International associates
- Building relationships with referrers
  - Understanding their needs (rational and emotional)
  - Establishing strong relationships
  - Setting goals and measuring results
  - Different approaches to selling
  - Collaboration: Joint marketing initiatives and Joint products and services
- Exercise: Developing a specific referrer development plan

Summary and close

Eligibility

This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 4,000 marketers in professional services firms. Visit www.pmforumglobal.com

pmforum

Thursday 22 June 2017

This half-day workshop takes place from 9.30 to 13.00 starting with a light breakfast.

To facilitate interaction, workshops are restricted to 18 attendees – maximum of four per firm

Trainer

Kim Tasso has worked within and for over 200 professional partnerships in the legal, accountancy and property sectors for over 20 years and continues to do so as a management consultant.

She also has direct client exposure from working with organisations in the technology, education, creative, media, real estate and not-for-profit sectors and through her work with a leading business school.

Unusually, she combines psychology, marketing and business qualifications so is effective both as a professional trainer, facilitator and coach and also as a subject matter expert in a variety of strategy, marketing, selling and relationship management topics.

She is highly rated as a trainer and coach for lawyers, accountants and surveyors and also lectures on Chartered Institute of Marketing (CIM) professional marketing qualifications for Cambridge Marketing College.

She is the author of books on growth strategies, business development, media relations and business development and a prolific conference speaker and journalist. She is commissioning editor for PM magazine.

Further information at www.kimtasso.com.

For information on other training workshop visit www.pmforum.co.uk/training

Why PM Forum training?

Courses are designed and delivered by **qualified and experienced professionals** who:

- have substantial experience working with both **senior fee-earners and marketing/business development professionals** in large and small professional service firms across the **legal, accountancy and property industries** as well as a variety of client markets
- have psychology credentials and many years' experience **in learning and development** to ensure an optimum learning experience
- are **subject matter experts** in strategy, marketing, selling, client relationship management and interpersonal skills who continue to practice and are therefore familiar with the latest developments

And delegates receive a **productive learning experience** because:

- There is a balance between knowledge transfer and active learning through **interactive discussion** and group exercises
- Courses are highly **experiential** – where idea sharing and networking are encouraged
- As well as copies of the presentation material, courses also include work sheets and **supplementary materials** with guidance for further learning. Some courses have exclusive booklets tailored to the needs of delegates
- Course leaders are experienced coaches with experience in **career development** and certificates of completion are issued for use in **Continuing Professional Development** (CPD)
- Dialogue can continue after training through members-only **LinkedIn communities**
- Only PM Forum members can attend events

Venue

Herbert Smith Freehills
Exchange House
Primrose Street
London
EC2A 2EG

Fees

First attendee	£225 + VAT
Second attendee	£215 + VAT
All subsequent attendees	£205 + VAT

Maximum of four attendees from the same firm. Prices are only for attendees booked concurrently. No booking can be confirmed without payment. The fee includes: continental breakfast • mid-morning tea/coffee • folder of workshop material

Cancellations/Substitutions

Due to the restricted number of places, refundable cancellations are only accepted up to one month prior to the event (a cancellation fee of £25 + VAT will be incurred per person). Substitutions can be made at any time. PMI reserves the right to cancel with no liability beyond refund of fees paid.

Cross-selling and referrer management accelerator – 22 June 2017

Name ..... | Name ..... | Name .....

Position ..... | Position ..... | Position .....

Firm ..... Type of firm .....

Address .....

..... Postcode .....

Tel ..... E-mail .....

Please enclose a cheque made payable to *Practice Management International LLP*
or pay by Visa/Mastercard/Maestro/AmEx *(please circle one)*

Cardholder name: ..... Amount: £ .....

Card number: ..... Expiry date: ..... Security code: .....

Signed ..... Date .....

Confirmation of booking will be sent by return along with a VAT receipt

Please return this form to: **PM Forum, 422 Salisbury House, London Wall, London EC2M 5QQ**
Tel: 020 7786 9786 training@pmint.co.uk www.pmforumglobal.com

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