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RELATIONSHIP MANAGEMENT PLAN TEMPLATE

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RELATIONSHIP MANAGEMENT PLAN **<PROJECT NAME>**

COMPANY NAME
STREET ADDRESS
CITY, STATE ZIP CODE

DATE

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INTRODUCTION

Customer Relationship Management (CRM) is an imperative business function which forms and develops a mutually beneficial relationship between a provider and a client. The significance of CRM has grown from simple customer service to an integrated solution which establishes a level of trust in forming long term relationships and identifying additional business opportunities. While CRM or a CRM Plan is not a formal tenet of project management, it is an area which can be used by an organization to compliment the products or services it provides through various projects.

Doe Consulting Group prides itself on building and maintaining strong relationships with its customers. We have learned that it is far more cost effective to manage existing relationships and capitalize on additional opportunities than it is to seek and win new customers. Doe Consulting Group has developed this Customer Relationship Management (CRM) Plan to provide background and an understanding of the customer, ABC Corp. The purpose of this plan is to identify the needs, communication requirements, opportunities, and value associated with ABC Corp. By understanding these variables we can develop a mutually beneficial strategy for managing a long-term value-added relationship with this customer.

CUSTOMER BACKGROUND AND DESCRIPTION

This section describes the customer organization and may include details regarding the customer's history, leadership, organizational structure/environment, industry, and performance. The more detail that is provided, the better the plan will illustrate ways in which the relationship can be effectively managed.

ABC Corp. is a leader in the ball bearing manufacturing industry. In the last 10 years ABC Corp. has grown from 1% to 22% in ball bearing manufacturer market share. Founded in 1995, ABC Corp. is based out of Richmond, VA with several plants located in the Midwest region where all manufacturing takes place.

ABC Corp. is organized into four divisions. These include: HQ consisting of approximately 300 personnel and all executive leadership—this also includes all human resources (HR), marketing, sales, and finance employees; Research and Development (R&D) consisting of approximately 300 personnel; Operations/Manufacturing consisting of approximately 2,200 personnel; and Logistics/Warehousing consisting of approximately 120 personnel.

ABC Corp.'s Chief Executive Officer (CEO), John Smith, was appointed in 2007 and has pursued a strategy of aggressive R&D to develop new products as well as process improvement and cost reduction measures. ABC Corp. has aggressively marketed the superior performance and cost of their products which has allowed them to gain market share at such an impressive rate.

ABC Corp. has primarily sought Doe Consulting Group services in the form of process improvement and records and information optimization (RIO). To date ABC Corp. employees have been extremely receptive and cooperative in working with Doe Consulting Group representatives on various consulting initiatives.

SPECIFIC CUSTOMER NEEDS

This section describes the specific needs that the customer has. These may be needs that are currently being addressed in the business relationship or needs that have been identified that can be developed into new opportunities. Many times a client will plainly state what their needs are to see if their vendor is able to help them. This section should not be confused with the identification of other potential opportunities.

Doe Consulting Group was contracted by ABC Corp. to help develop a standard and formal process by which ABC Corp. could identify weak or inefficient processes, develop improvement courses of action, and implement the approved process improvement measures. While a majority of this effort has been completed, Doe Consulting Group consultants continue to work closely with ABC Corp. to address issues on a case-by-case or as-needed basis.

Doe Consulting Group was also contracted by ABC Corp. to develop and implement a RIO solution which provides capture, storage, and organization for all ABC Corp. operational data as well as administrative records. This work is ongoing and ABC Corp. has been pleased with the progress made to date. Doe Consulting Group has developed data bases for the capture and organization of operational data (including manufacturing specifications, testing data, and plant performance measures). Doe Consulting Group is now working closely with ABC Corp. HQ to develop and implement an integrated records management solution. This solution will provide an integrated platform for ABC Corp. to manage HR records, appraisals/evaluations, benefit records, leave requests, insurance requirements, payroll activities, and training.

ABC Corp. has informed Doe Consulting Group that it requires assistance in developing an effective organizational structure within its R&D group to more efficiently manage projects. While no contract activity has taken place thus far, Doe Consulting Group has developed a plan to establish a project management office (PMO) within ABC Corp.'s R&D group and is scheduled to present this plan to the ABC Corp. CEO, President of Operations, and President of R&D.

ADDITIONAL CUSTOMER OPPORTUNITIES

Many times, through the course of normal work between organizations, other potential opportunities may be identified which have not specifically been brought up by the customer. This section provides a description of these opportunities, any discussions that have taken place regarding these opportunities, and how the organization may be able to help the customer. This section may also provide a list or description of next steps in pursuing these potential opportunities. There may also be occasions where the potential opportunity comes with significant risk or is not pursued for another reason.

During the course of currently contracted work, Doe Consulting Group employees have identified another potential opportunity within the Logistics/Warehousing Group of ABC Corp. Doe employees observed that ABC Corp.'s logistics and warehousing operations are very inefficient and that there are frequent issues with shipments being made late, inaccurate shipping manifests, and incorrect products being placed into customer orders. No direct discussions have

taken place with ABC Corp. leadership in reference to these challenges but Doe Consulting Group is confident it can provide value to ABC Corp. in the form of an integrated logistics solution (ILS) approach. Doe has had great success with other customers developing and implementing a tailored ILS approach. In order to determine if this opportunity is viable, Doe Consulting Group must initiate a conversation with ABC Corp. to determine whether this is an area in which ABC Corp. understands it may have a problem and is an area they would like to improve.

In preparation for the pursuit of this opportunity Doe Consulting Group will compile feedback and testimonials from customers who we have supported with various logistics solutions. Doe Consulting Group representatives will initiate a discussion on these issues as a follow-on to the scheduled PMO presentation with ABC Corp.'s CEO and President of Operations. Based on these discussions, further guidance will be given regarding the development of cost estimates, resource planning, and scheduling.

RELATIONSHIP STRATEGY

This section describes the strategy for how the organization will strengthen and maintain the business relationship with its customer. This may include descriptions of the health of the current relationship, courses of action to grow the relationship, any opportunities for partnering, descriptions of any conflict in the relationship, and any individuals or groups which must be part of this effort.

The relationships developed over the last few years between Doe Consulting Group and ABC Corp. is considered strong with a significant level of trust. ABC Corp.'s senior leadership feels comfortable approaching Doe Consulting Group in order to discuss problems and issues and identify ways in which we can help. ABC Corp. has acknowledged that Doe Consulting Group has met all of its deliverables for every contract on time, budget, and in a manner consistent with our standards of integrity. Additionally, ABC Corp. has acknowledged that the completion of every effort has resulted in significant value for their organization in the form of efficiency, cost reduction, and output.

To date ABC Corp. has been very open to ideas and opportunities identified by Doe Consulting Group and most of these opportunities have been converted into contract awards. This illustrates a significant and healthy level of trust in this business relationship. Because of the nature of ABC Corp.'s business, there are not currently any plans or opportunities to partner, however, Doe Consulting Group can continue to grow this relationship in two ways. First, we must continue to look for opportunities to improve ABC Corp.'s business and help them streamline their processes and operations. Specifically, we must target opportunities that will result in significant benefits to ABC Corp.'s business and are of high value-added impact. Secondly, we must perform our contracted work in an exceptional manner and provide consistent value to our customer. By showing our customer our willingness to help them improve their business and proving the value we bring, Doe Consulting Group can continue growing this long-term relationship in a mutually beneficial manner.

Senior leadership of Doe Consulting Group and ABC Corp. maintain an open door and cordial relationship. This is the level at which most discussions take place regarding new opportunities and ongoing initiatives. There is also frequent interaction between Doe Consulting Group's sales force and ABC Corp.'s contracting group as contracts, statements of work, and task orders are coordinated. These groups and individuals must be informed of all communications between our two companies.

COMMUNICATION PLAN

This section should describe how the company will maintain communications with the customer. This may include methods of communication, frequency, who will communicate, what information will be communicated, and the purpose of the communications. Effective communication is an important part of building and maintaining healthy business relationships with customers. They must understand that their needs are important to us as well as understand the ways we can help them which they may not already be aware of.

Doe Consulting Group maintains a communication plan with all existing customers in addition to ongoing marketing initiatives. Communication plans are tailored for each customer based on the relationship already in place and the needs of the customer. Doe Consulting Group sends personalized emails to customer senior leadership informing them of new services that we offer and how it may benefit their organization. These new services are also updated on our website as they are created.

Doe Consulting Group's President and Executive Vice President maintain frequent dialogue with ABC Corp.'s CEO, President of Operations, and President of R&D. This dialogue includes discussion of status of ongoing initiatives, other areas of support, and general industry information. Much of the contracted work Doe Consulting Group has received from ABC Corp. was a result of these conversations. The purpose of these discussions, other than informal conversation, is to inform each other of the capabilities, strengths, and limitations of their organizations and identify pain points where support may be needed. These communications take place on approximately a monthly basis and are usually via telephone call. Occasionally, a business lunch is planned for face to face conversations.

Doe Consulting Group's marketing and capture team communicates on a weekly basis with ABC Corp. These discussions are detail focused and are usually the result of discussions between each organization's senior leadership on support efforts. The purpose of these discussions is to explore efforts being discussed between senior leaders and identify the best approach for developing and authorizing contract support, establishing points of contact, and looking at resources required. These communications are usually conducted in a meeting and are face to face in a work group type of environment.

Doe Consulting Group's marketing group is also responsible for corporate events and sponsorship. In the past Doe Consulting Group has been a gold sponsor of ABC Corp.'s annual golf tournament. This event has helped our company make inroads with ABC Corp. as we have shown our support through sponsorship and prize donations. This is a practice we will continue with ABC Corp. and other valued customers.

Doe Consulting Group Communication Points of Contact:

Name	Title	Email	Phone Number
J. Doe	President and COO	j.doe@dgc.com	(999) 555-1110
D. White	Executive VP	d.white@dgc.com	(999) 555-1111
M. Black	Marketing Manager	m.black@dgc.com	(999) 555-1113
S. Green	Marketing Capture Manager	s.green@dgc.com	(999) 555-1122
A. Thomas	Sales Manager	a.thomas@dgc.com	(999) 555-1133

ABC Corp. Communication Points of Contact:

Name	Title	Email	Phone Number
R. Jones	CEO	r.jones@abc.com	(999) 123-1212
D. Johnson	President of Operations	d.johnson@abc.com	(999) 123-2121
B. Franklin	President of R&D	b.franklin@abc.com	(999) 123-5151
E. Smith	Contracts Manager	e.smith@abc.com	(999) 123-3131
L. Davis	Procurement Manager	l.davis@abc.com	(999) 123-4141

VALUE PROPOSITION

This section should describe the how your company adds value to the customer. It should address what your company offers that others do not or why your performance is more valuable than a competitor's. Customer satisfaction, unique products or services, or tailored solutions are common ways a company can establish value. Value propositions are used to set your company apart from its competition. The tenets of the company's value proposition should be the basis of communication between your organization and existing or potential customers.

Doe Consulting Group provides service based solutions in the areas of project management, process improvement, integrated logistics, management consulting, and records and information optimization. However, we are not the only company that provides these services. The strengths of Doe Consulting Group are its people, practices, and unwavering customer service. Over the years, these strengths have resulted in a high level of customer satisfaction and loyalty.

People – Doe Consulting Group draws professionals from the best schools and companies and provides them with the tools and practices to allow them to reach their full potential through extensive development opportunities. Doe employees are high achievers with unquestionable integrity. The value added by our employees is immediately evident when they're interacting with their clients and manifests itself through the feedback we receive from our customers.

Practices – Doe Consulting Group leverages best practices but takes it one step further. We ensure that these practices are tailored to each individual customer based on their requirements

and organizational structure and processes. We fit our solutions to the client, not the other way around.

Customer Service – Doe Consulting Group is with our customers every step of the way. Each customer has its own outreach professional within Doe who they can contact for information or with questions. Our on-site teams remain engaged throughout the contract lifecycle always seeking ways to improve their services. Our hands on approach ensures that an engagement will not end until our customer is completely satisfied with the deliverables.

Based on these strengths Doe Consulting Group maintains an extremely high customer retention rate which illustrates the value we add to our clients.

APPROVALS

The Relationship Management Plan may or may not require executive approval depending on the organization. Although it is an extremely valuable tool, it is not a formal part of project management methodology or framework.

The signatures of those below indicate an understanding in the purpose and content of this document by those signing it. By signing this document you indicate that you approve of the proposed Relationship Management Plan.

Approver Name	Title	Signature	Date
Doe, J.	President and COO		
White, D.	Executive VP		

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