TIME TO RISE

CEI Client CARES Action Plan

Collaboration - Action - Resources - Engagement - Support

"LEAN IN" WITH YOUR CLIENTS

- Be human - remind them that they won't have all the answers and it's ok to be vulnerable
- Be the "Broker of Good Ideas"
- The currency of COVID is the TRUST that you are building
- Let them see your heart
- Offer to participate in their leadership planning meetings

SHARE SIMPLE DIRECTION THAT FOCUSES ON THE BASICS

- Be persistent in checking in with clients
- Discuss ideas on how they can adapt their meetings in a virtual world
- When we all recover, you want your client to say…"they were with me and I couldn't have gotten through this without them"
- Remind them to celebrate small victories

HELP YOUR CLIENT CLARIFY WHAT THEIR TEMPORARY RALLYING CRY IS FOR THEIR TEAM

- This gives clarity and focus to the team
- Assists in quicker decision making
- Offer to review their communication plan
- Be creative and share ideas you are hearing

LET THEM KNOW SPECIFICALLY WHAT YOU CAN DO FOR THEM

- Don't just ask how can we help, be specific:
  - Offer to host a virtual meeting with their leadership team to discuss business continuity
  - Offer to reach out to their other trusted advisors to share ideas and discuss ways to collectively help
  - Help them review their business costs
  - Discuss the government guidance and help available

BE A RESOURCE

- Partner with them in investigating what help is available through their financial institutions
- Conduct check in calls with their Human Resource leadership
- Guide them as they review their insurance policies
- Foster community—bring your network to theirs

HELP THEM LOOK TOWARD THE FUTURE

- Help them identify their state of readiness for the return
- Offer to participate in their strategic planning realignment
- Connect them with other clients to create future collaborations
- Encourage them to invest in the development of their people now

888.758.8234 | www.clientei.com

CLIENT EXPERIENCE INSTITUTE