

Client Management for TSIs



SUMMARY

This course details the client management process for Trade and Investment Support Institutions (TISIs). Placing particular emphasis on the role of TISI Client Managers, the creation of an Export Support Plan, and management and review activities, the course focuses on providing concrete solutions to assist TISIs in implementing effective client management as a part of their client relations activities.

TARGET AUDIENCE AND OBJECTIVES

The course “Client Management for TSIs” is a 2 week-long introductory course for the Staff of TSIs.

AT THE END OF THIS COURSE, PARTICIPANTS WILL BE ABLE TO:

- Grasp the importance of client management for TISIs;
- Understand the role of TISI Client Managers in the client management process;
- Link the 5 stages of the client management process with specific actions to be performed; and
- Assess the appropriate review and remedial activities to implement.

CERTIFICATION



Participants who meet the course requirements will receive a Certificate of Achievement issued in electronic format. The certificate is verifiable through the SME Trade Academy.

COURSE STRUCTURE

- Lecture 1: Introduction to Client Management in TSIs
- Lecture 2: The Export Support Plan
- Lecture 3: The Management and Review Process
- Case Study 1:
Pontia Exports – Introducing Effective Export Client Management

REGISTRATION



Interested participants can register to this course by going to the SME Trade Academy website at:

learning.intracen.org

Once on the website, simply create a new account, input your information, and sign up to the course.

COURSE PARTNERS




Federal Ministry
for Economic Cooperation
and Development



MINISTRY FOR FOREIGN
AFFAIRS OF FINLAND

Sample course slide

The risks of not having a structured client management process



There are several risks for a TSI's operations if it has not implemented a structured client management process.

Those risks are as follows:

- 1 The TSI may stretch its resources thin by trying to provide all services to all clients.
- 2 The TSI will have a reduced ability to develop tailored and value-added services for its clients.
- 3 The TSI will not develop much client loyalty, as its clients will only access its services on an ad hoc basis.
- 4 The TSI's role will not be understood or valued, as it will simply be viewed as a provider of services.
- 5 The TSI will have a reduced opportunity to add value and create a more significant impact among its client base. Even though it may be very busy, it might not necessarily achieve its desired impacts.

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