

Account Management

“Everything you need to know”

Presenters:

- Marelyn Krueger, VP Global Account Management, GMS BridgeStreet Worldwide-Facilitator
- Dave Caple, CEO, CCHP ABODA-Panelist
- Kendra Cofer, VP Business Development, CWS Housing-Panelist
- Cathy Bokman, VP Market Operations, CCHP Marriott ExecuStay-Panelist
- Tammy Jackson, NALP Sales Director, Princeton Properties-Panelist

How does your company manage your top accounts?

- Do you rely on your sales team?
- Do you have a formal process?
- Does everyone on your team understand the client's expectations?

Discussion objectives:

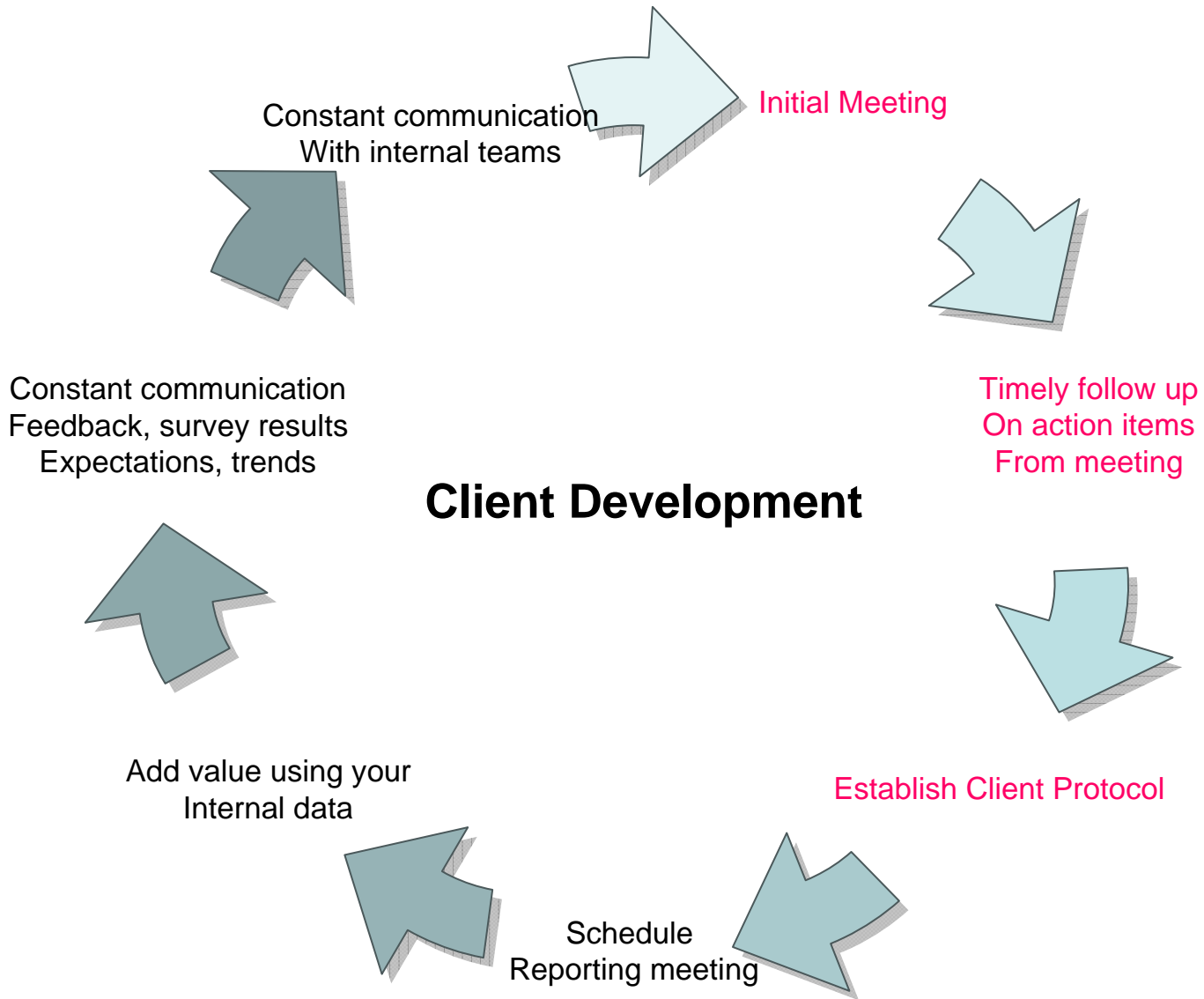
- Gain ideas on how to manage your top accounts outside of using only your sales people
- Discuss managing expectations on service and how that involves the entire team
- How does the RFP process impact each department and what do you need to do when you win the account?
- What are your procedures to manage the account?
- Connecting the contract to the daily activity in order to monitor SLA's
- Are you doing regular scheduled meetings with your clients and why is this important?
- Handling escalations and Issue Resolution
- How does reporting fit into your strategy to manage your client?

You won the account!!! Now what???

- Either winning an account by an RFP or relationship building or simple gaining the business because you were the person they called for service....the panel will describe their process for building an account plan

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Understanding the Account

- Decision Process?
- What is their value?
 - Current
 - Potential
- Do you Understand their NEEDS?
- Are you creating VALUE/SOLUTIONS?

Initial Meeting

- With Client
 - Setting Expectations
 - Determining all departments involved
- Internal
 - Announcement – Celebration
 - Announcement – Requirements
 - Identify Account Team and Roles

Follow-UP

You are the Expert

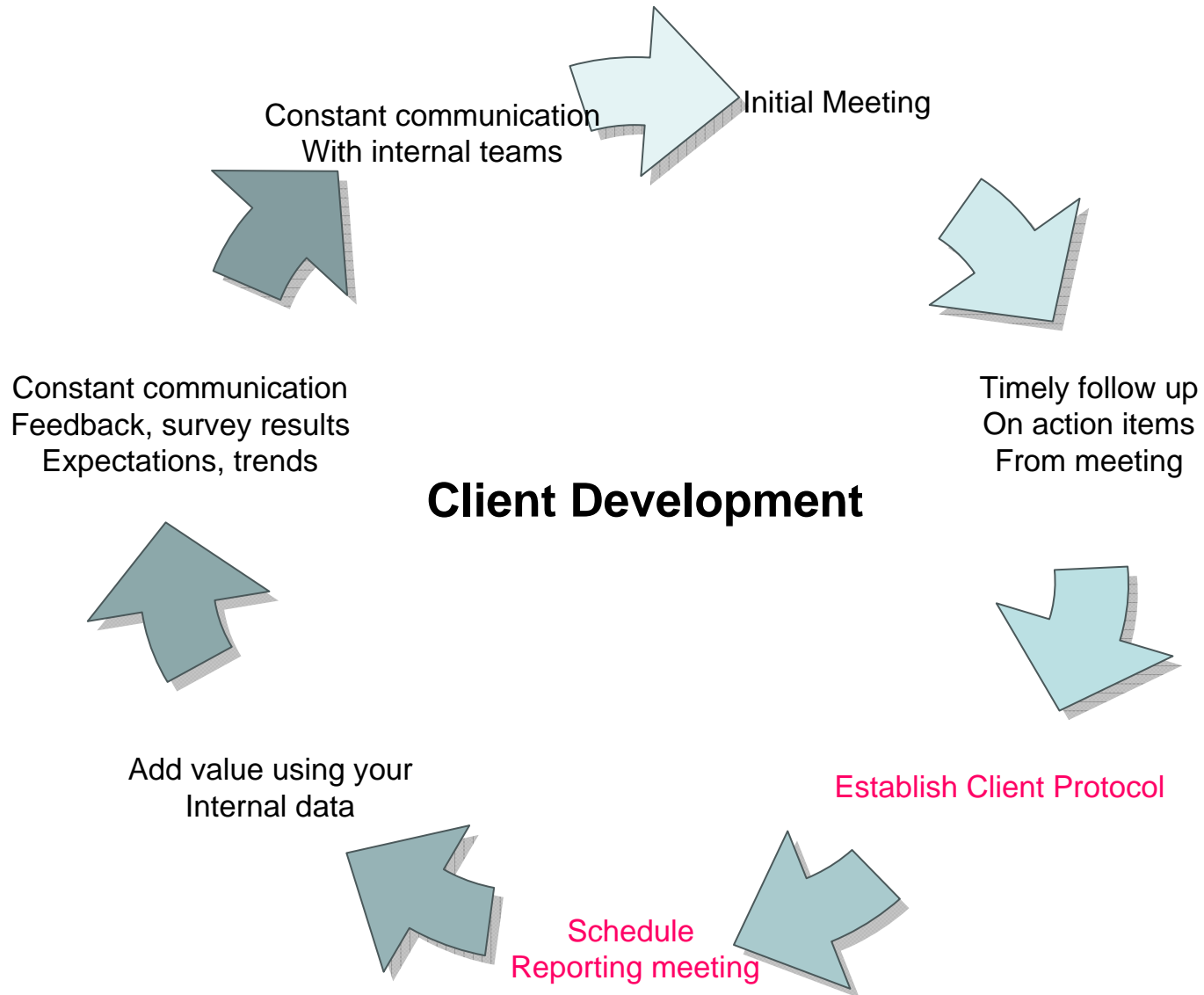
- Are the follow-up items
 - Are they “Like to Have”?
 - Are they actionable and create value?
 - Is this a one time request?
 - Should it be done in a part of regular follow-up?

The Client Protocol

- What works best for the client
 - Engage internal and external input
- Is the Protocol capturing and growing share?
- How many levels of your organization are engaged and at what level?

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Client connection

- Do you have a formal game plan for each client?
- How does client interaction impact the account?
- Top to bottom interaction
- Monthly/quarterly business reviews

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Sample Client Protocol Input Form

S
A
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E

COMPANY NAME:		LAST UPDATE:		DATE CREATED:	
		BDA POINT OF CONTACT:		CLSV POINT OF CONTACT:	
POINT OF CONTACT		SURVEY'S & 24-HOUR CALL		REPORTING	
Name:		Can we survey the client?		Business Reviews Provided?	
Address:		Can we survey the occupant?		Frequency:	
Phone #:		Forward surveys to?		Who Prepares Report?	
Fax #:		Who forwards survey?		Who Presents Report?	
E-mail:		Other:		If Statements Required, Send electronically or mail?	
Type of Client: Relo Co/Third Party/Business 2 Business (B2B)					
PRICING		BILLING		APPROVED PROPERTIES? LIST:	
Pricing provided? Yes or No		Direct Bill?			
If yes, see Rate tab in workbook		Billing Address:			
Referral Fee Amt (Daily or Month)		Billing Contact:			
Client or CWS track referral?		PO #:			
If client directed are referral fees the same?		Exception Paid by occupant?			
If no, client name:		Exception Paid by client?		WHAT IS CONSIDERED AN EXCEPTION?	
		Statements Required?		Maid Service	
		Credit Card?		Pet Fees	
Can we use third party?		SPECIFICS		COUNSELORS NAMES IF APPLICABLE:	
Other:		Key arrangements?			
		Include Welcome Basket?			
		Maid Service?			
		If Yes, who pays?			
		Can we leave CWS info?			
		Pet Policy (who pays)?			
PAPERWORK		OTHER		OTHER	
Corporate App Complete?		NOTES:		NOTES:	
Background Letter on File?		Bridalite of Main Contact:			
Who signs the Lease?					
Who gives the NTV?					
Is there a NTV Policy?					
Master Lease Agreement?					
Service Level Agreement?					
Contract? Date expires:					
Other:					

Sample Meeting Agenda/Reporting

- Authorization Summary
- Expense Summary
- Average length of Stay
- Exceptions
- Top Properties Utilized
- Floor plan Breakdown
- Grade Level of Employee
- Client Satisfaction Survey Data
- Service Defects & Recovery
- Trends
- Highlights (include any cost savings)

Sample Meeting Agenda/Introduction

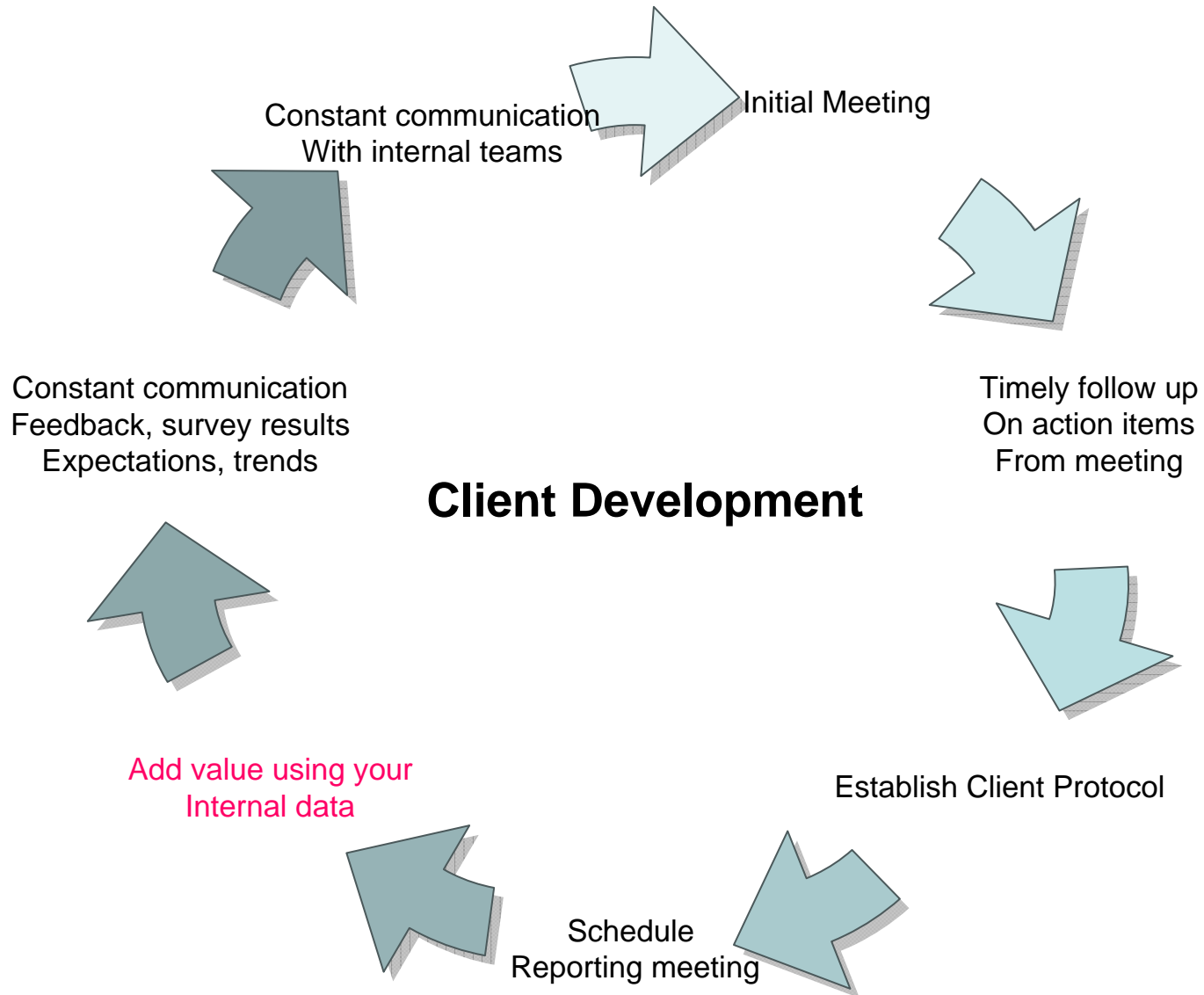
- Brief History
- Business Model
- Sample Clients
- Capabilities
- Core Markets
- Overall Company Service Level
- Issue Resolution Process
- Reporting
- Technology
- Accolades

Sample Meeting Agenda/Existing Client

- Guest Experience/feedback
- Current Volume
- Issues & Resolutions
- Internal company or team updates
- Trends
- Upgrades to your brand
- Specials

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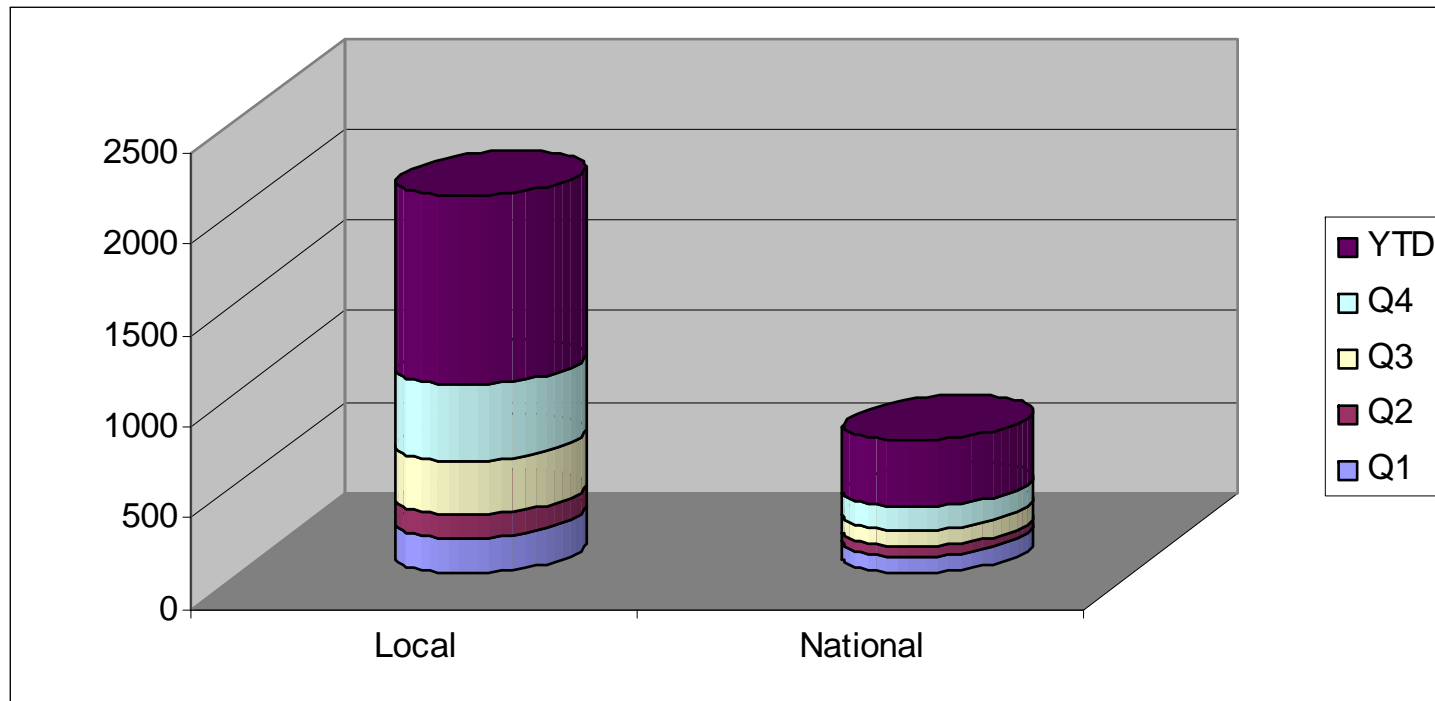
Reporting and Strategizing

- Summary of Corporate Client Reporting
 - Weekly
 - Monthly
 - Quarterly
 - Semi-Annually
 - Annually
 - Online 24/7 Access?

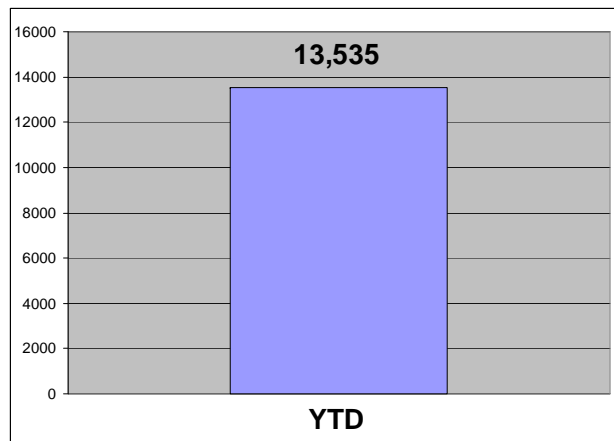
Reporting and Strategizing

	A	B	BF	BJ	BN	BO	BP	BQ	BR	BS
1	2009									
2	Total # of Guest Check Ins¹		Q1 Actual	Q2 Actual	Q3 Actual	October	November	December	Q4 Actual	YTD Actual
3	Local Check Ins		152	152	152	61	39	52	152	608
4	National Check Ins		82	82	82	31	12	39	82	328
5	Total		234	234	234	92	51	91	234	936
6										
7	2009									
8	Total # of Guest Nights		Q1 Actual	Q2 Actual	Q3 Actual	October	November	December	Q4 Actual	YTD Actual
9	Local Guest Nights		765	765	765	300	200	265	765	3,060
10	National Guest Nights		262	262	262	100	50	112	262	1,048
11	Total		1,027	1,027	1,027	400	250	377	1,027	4,108
12										
13	2009									
14	Average Length of Stay		Q1 Actual	Q2 Actual	Q3 Actual	October	November	December	Q4 Actual	YTD Actual
15	Local Average		48	48	48	45	52	49	48	48
16	National Average		32	32	32	30	22	32	32	32
17	Total		38	38	38	38	37	41	38	38
18										
19	2009									
20	Number of Guests Checked out		Q1 Actual	Q2 Actual	Q3 Actual	October	November	December	Q4 Actual	YTD Actual
21	Local Check Outs		17	17	17	10	5	2	17	68
22	National Check Outs		4	4	4	1	-	3	4	16
23	Total		21	21	21	11	5	5	21	84
24										
25	2009									
26	Total Spend		Q1 Actual	Q2 Actual	Q3 Actual	October	November	December	Q4 Actual	YTD Actual
27	Local Spend		\$ 5,598,317	\$ 5,598,317	\$ 5,598,317	\$ 1,235,698	\$ 2,356,987	\$ 2,005,632	\$ 5,598,317	\$ 22,393,268
28	National Spend		\$ 1,774,259	\$ 1,774,259	\$ 1,774,259	\$ 564,235	\$ 625,789	\$ 584,235	\$ 1,774,259	\$ 7,097,036
29	Total		\$ 7,372,576	\$ 7,372,576	\$ 7,372,576	\$ 1,799,933	\$ 2,982,776	\$ 2,589,867	\$ 7,372,576	\$ 29,490,304
30										
31	2009									
32	Client Satisfaction		Q1 Actual	Q2 Actual	Q3 Actual	October	November	December	Q4 Actual	YTD Actual
34	Satisfaction Score (4s and 3s)		100%	100%	100%	100%	100%	100%	100%	100%
36	Top Block (4s only)		681%	767%	852%	91%	100%	60%	938%	810%
38	Bottom Block (1s only)		10%	14%	19%	0%	0%	20%	24%	17%
39	# of responses received		21	21	21	11	5	5	21	84
40	# of guests checked out		21	21	21	11	5	5	21	84
41	Response Rate		100%	100%	100%	100%	100%	100%	100%	100%
42										

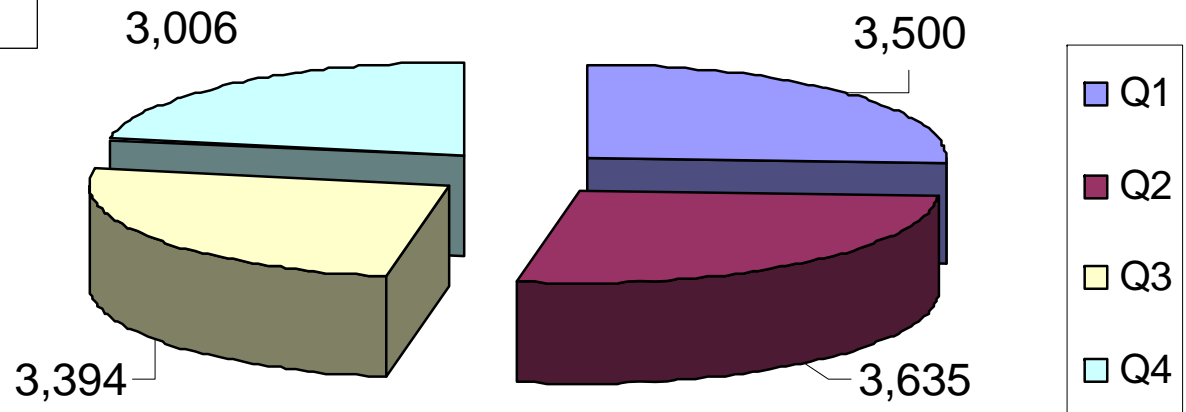
Total number of guest check-in's



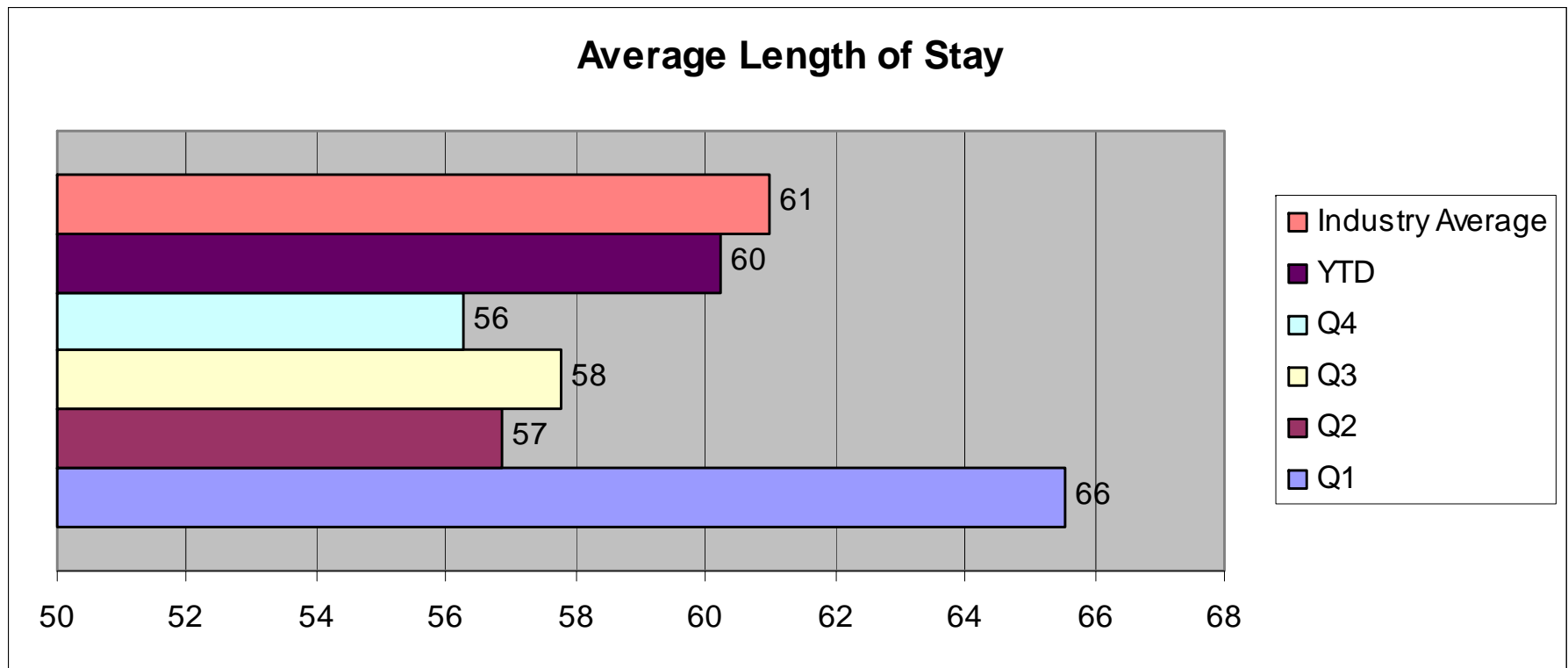
Total number of guest nights



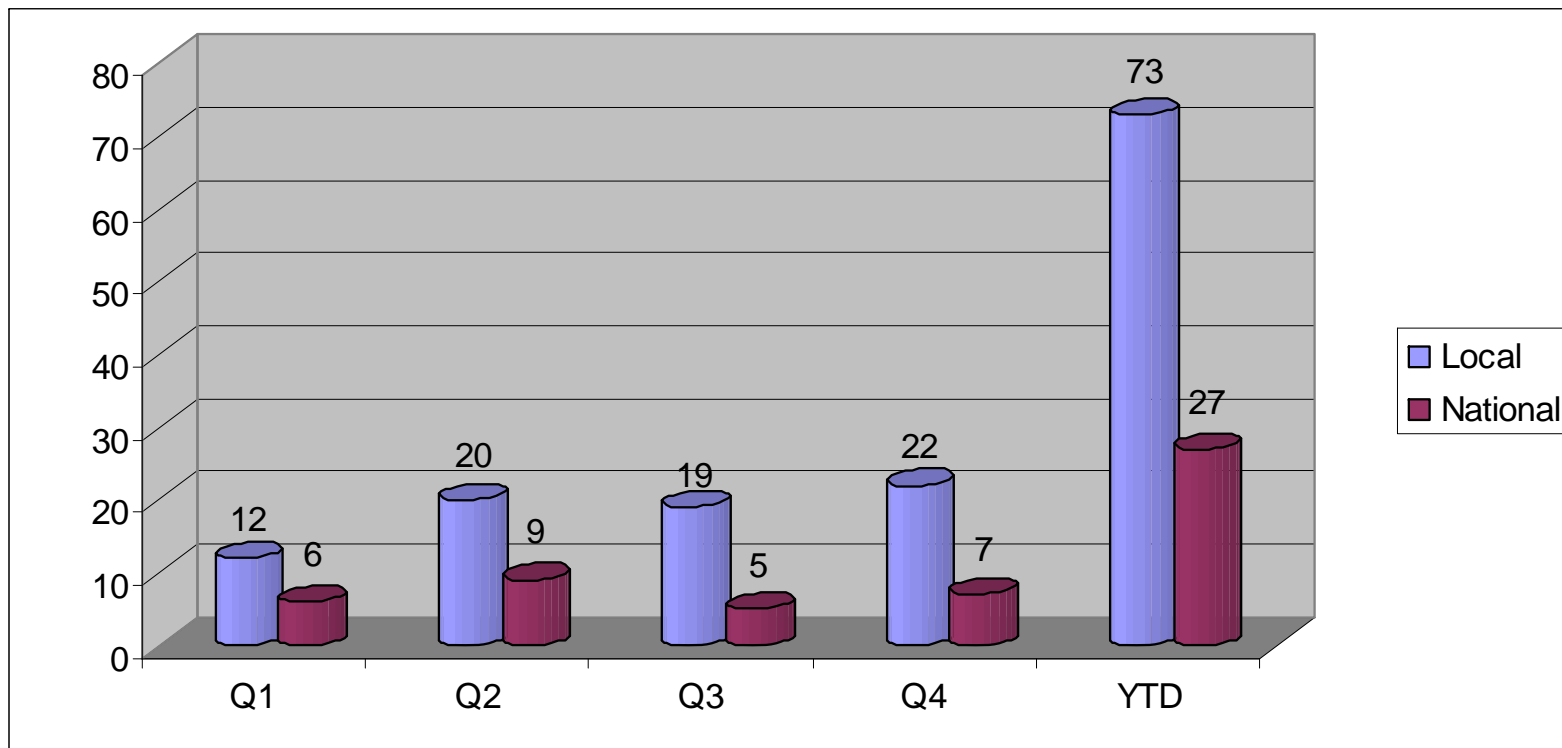
Guest Nights



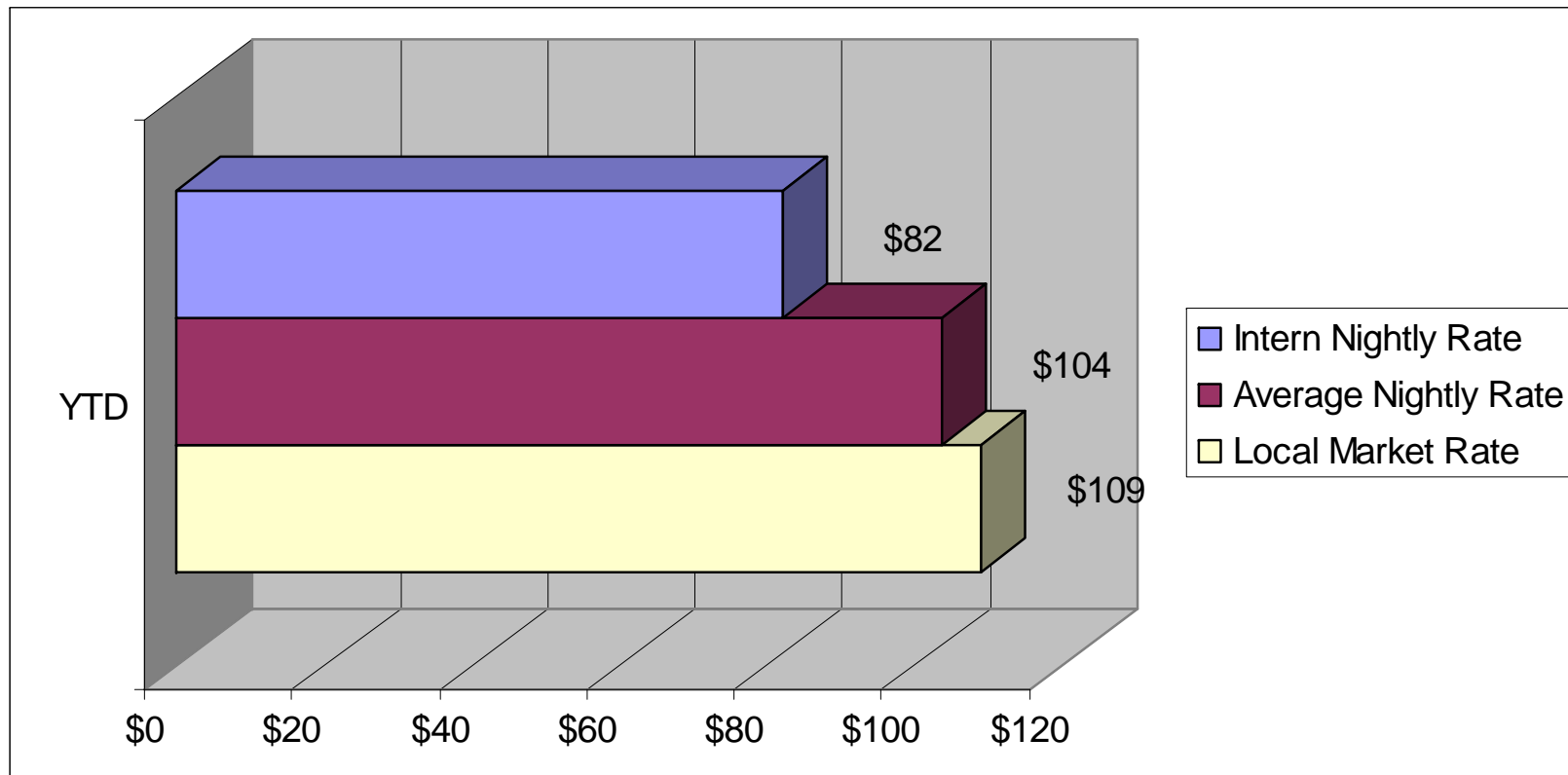
Average length of stay



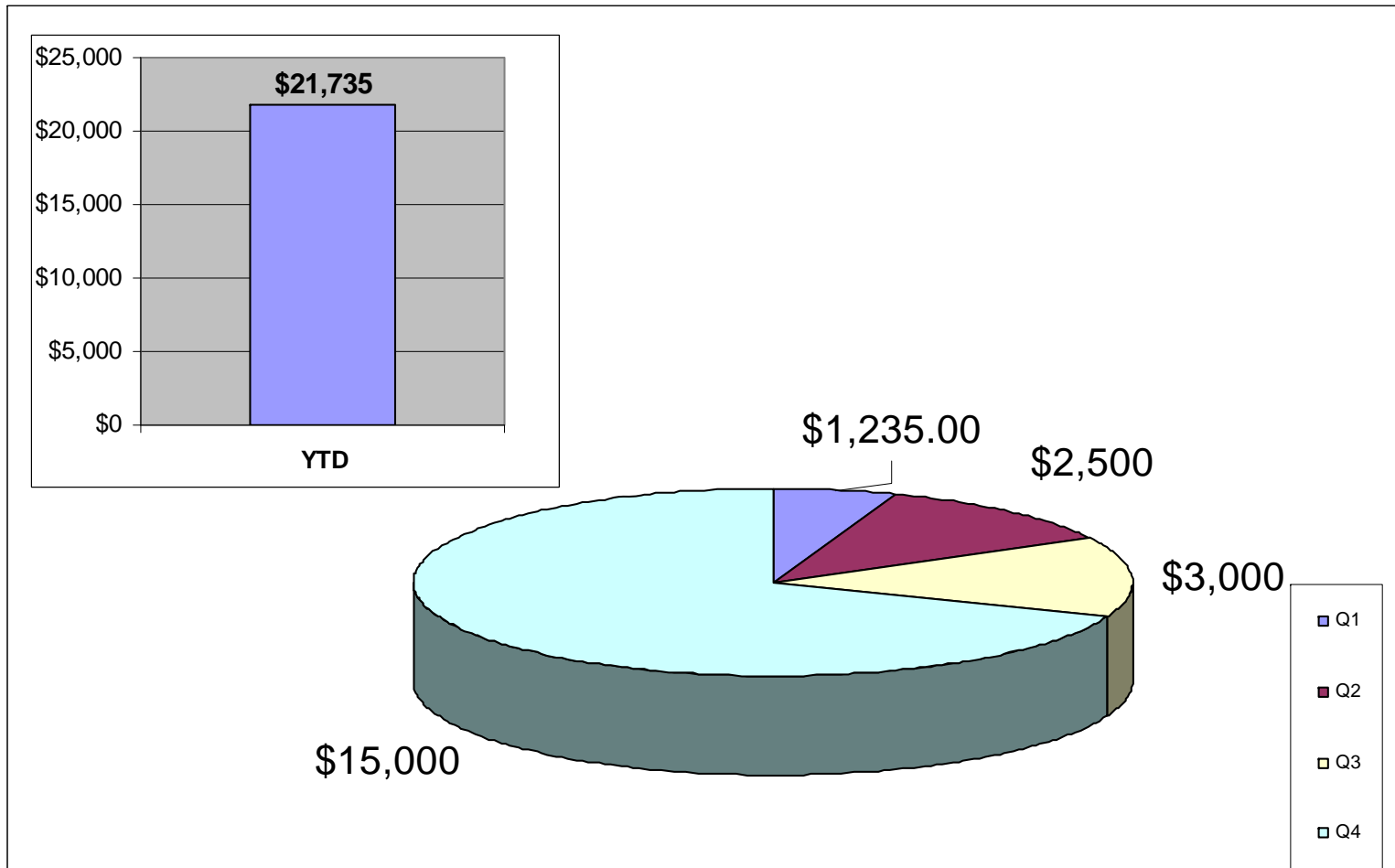
Number of guests checked out



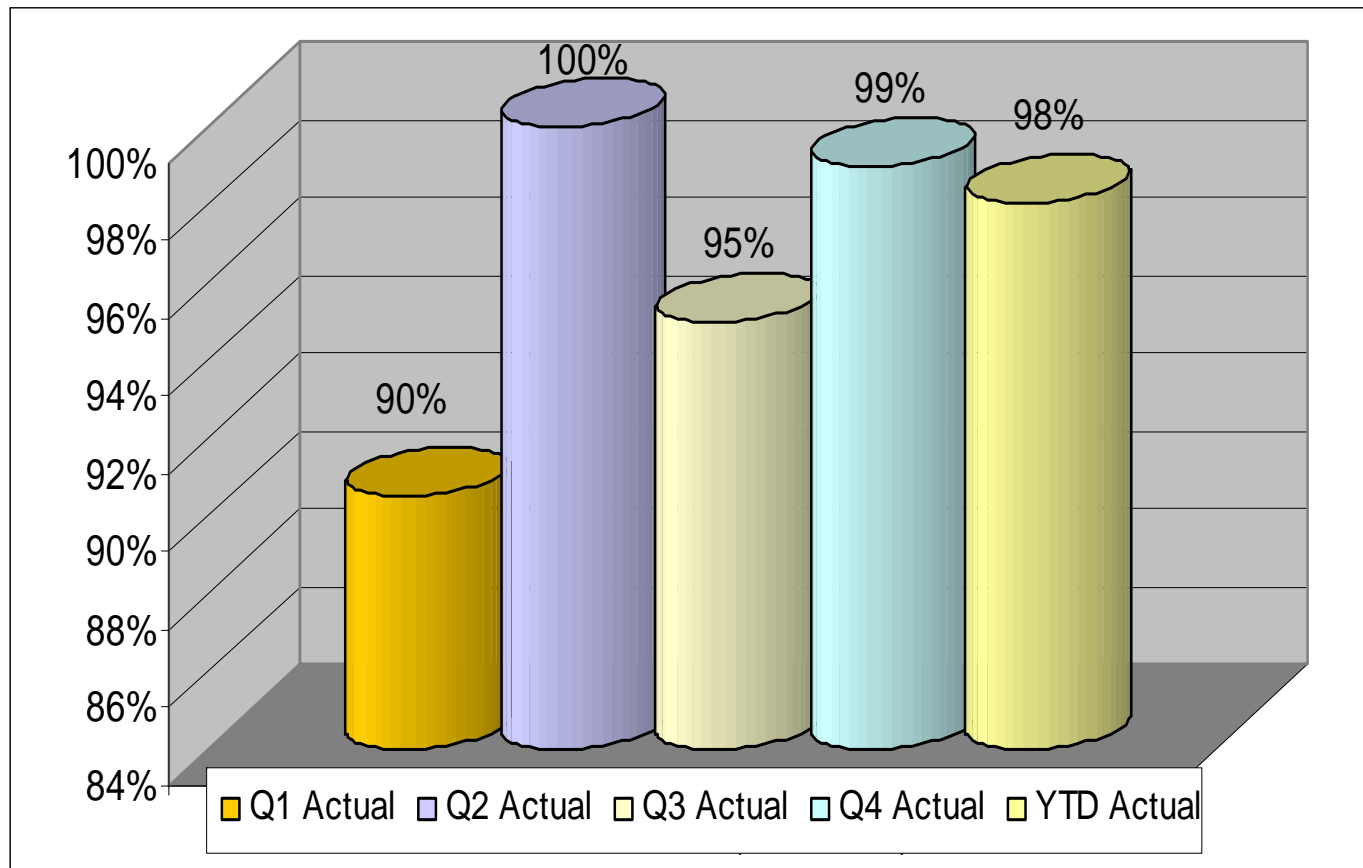
Intern nightly rate (roommate “Sardine Factor”)



Total Spend



Service Scores & Issues



Highlights:

- 98% YTD Satisfaction
- 40% Return Rate
- 5% improvement Y/Y

Lowlights:

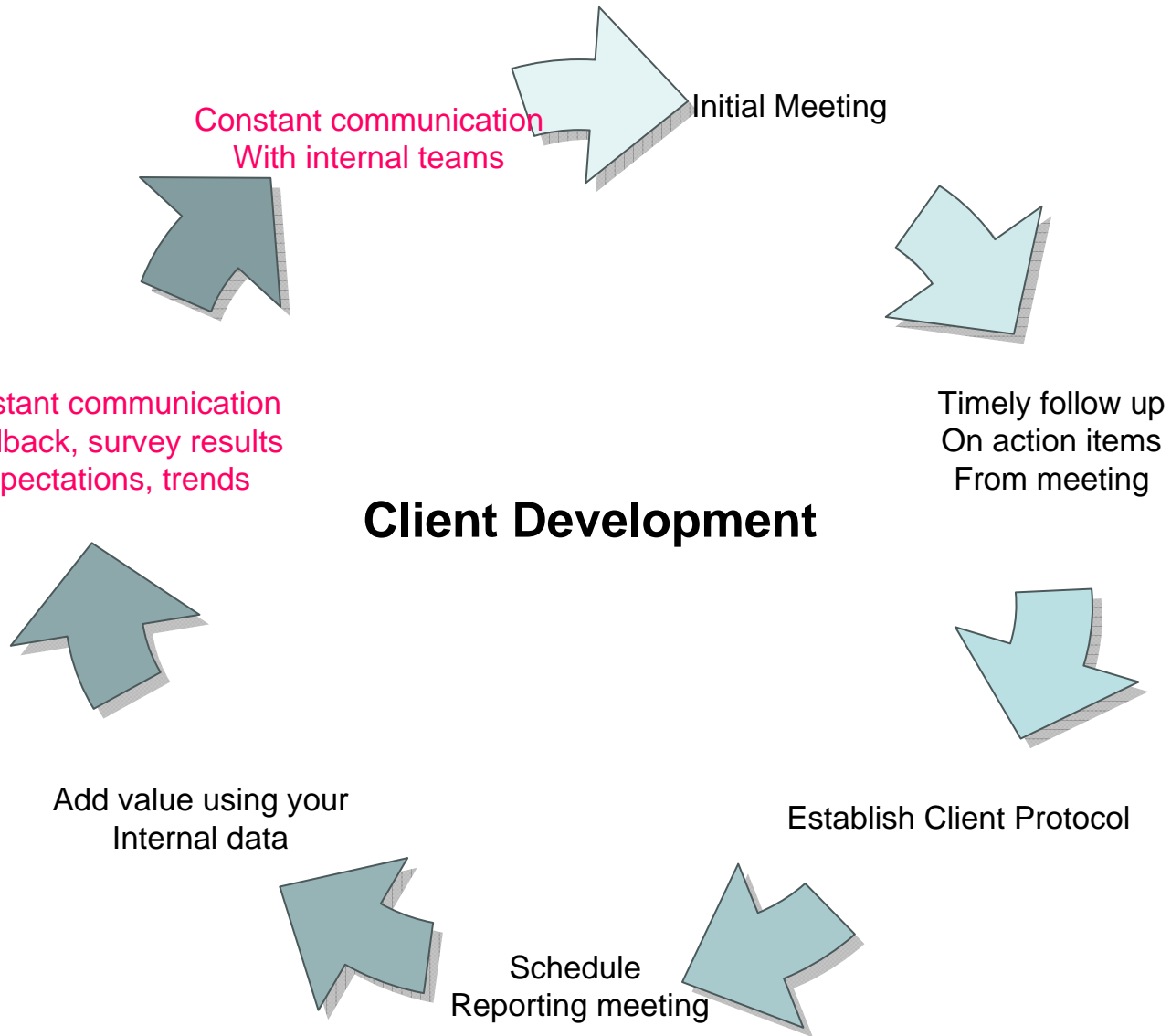
- 1 Bed Bug Situation
- 2 Guests asked to be moved
- Auth to arrival date average only 5 days

Convey information and provide value added insight

- High/lows for the period
- Average nightly stays vs. corporate policy
- Exceptions (Ex: nights over policy)
- Volume by location (if applicable)
- Total nights and spend vs. previous period
- Industry trends, including ADR's, average nightly stays, etc.
- Service Scores, highlights & Issues
- Recommendations for improving program and guest experience
- Accountability FOR BOTH SIDES!

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Handling Issue Resolution

- When something goes wrong what is the process to resolve?
- Does the entire team understand your process?
- Can you turn a negative into a positive?
- Issue resolution should be part of a daily management process

Issue Resolution at Site Level

Lead Issue:

ISSUE:

- Prospect wants to stay with you, but requires an additional service or item in order to get the reservation.

RESOLUTION:

- Request submitted to account manager for review and authorization.
or
- Account Manager would contact client to discuss costs and options
- when added – a service order would be entered into AMSI and noted on clients file, as well as in ACT for future.

Issue Resolution During the Stay

ISSUE:

- Client has a problem with something in the apartment upon move in:
- Into the stay:

How the guest makes the issue known:

- contacts the on site office.
- contacts their recruiter.
- contacts their relocation company.
- Contacts their employer.

RESOLUTION:

- Check list from pre move in inspection reviewed.
- Enter request in our Service Order Program – AMSI, at the site level. Or Outside Vendor is contacted.
- Service order is handled within 24 – 48 hours depending on nature of issue.
- Follow up call 72 hours after original notification to confirm completion and satisfaction.
- Prior to any move in – a check list is completed on the apartment and the procedures for moving in a guest. Once this is completed, it is signed, dated, and placed in client file.
- Issue requires more work or can't be resolved with apartment occupied, we do offer a transfer to another apartment or community.

Issue Resolution at Move Out

Issue:

- 1. Damages found in the apartment at pre move out inspection.
- 2. Damages found in the apartment after inspection and guest leaves

Resolution: 1

- Pre move out inspection completed during last housekeeping visit, unless client requires it to be done the day they are leaving (noted on account)
- Billable damages are photographed and an invoice is created in AMSI to be submitted to client, along with a copy of the pre move out inspection.

Resolution 2

- Contact the client and submit photo and invoice.

Keep in mind that there is always a chance that damages are missed during the inspection. Or the damage occurs during the move out – we contact the client to discuss and bill accordingly.

Some clients have their own requirements for damages and inspections, this will be noted in guest file as well as in ACT under client notes.

Tools to help Manage your Account



- Capture an interface for all of the information and action items shared during your meetings.
- Replaces tools (like Microsoft Word) to help you efficiently record every aspect of your meetings.
- Allow quick and easy way to capture every aspect of your meetings, including:
 - Roll call
 - Agendas
 - Audio
 - Meeting Minutes
 - Action items
 - Key points & decisions
 - Document sharing

Tools to help you manage your Account



- **Build custom fields in Accounts, Contacts, Opportunities specific to your business.**
- **Utilize custom reporting to track client trends.**
- **Set up daily reporting to track issues, volume, etc..**
- **Upload client protocol, meeting notes and press releases.**
- **Utilize tasks and events to track upcoming opportunities and follow-up to action items.**
- **Create custom fields to track service defects and escalations.**

Tools to help you manage your Account



- Create your account
- Maintain Existing Accounts
- Monitor Group Accounts
- Schedule Activities
- Quick and easy way to send correspondence
- Create and send emails and letters
- Create Dashboards

Tools to help you manage your Account



- Gives you a system
 - Dates
 - Ownership
 - Next steps

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Questions?