

Client Unlock

Training programme for
client-facing teams
and future-fit agencies



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**For agencies who want to
turn existing clients into
their biggest growth lever**

Inside Client Unlock

Programme designed to work as a full set, or individual modules.

Client Foundations

01

The Client Servicing Playbook

02

Commercial Confidence:
knowing the numbers that matter

Client Experience

03

The 'Delivery to Advisor' Shift

04

**Straight Talk &
Navigating Difficult Conversations**

05

**Planning for Existing
Client Growth**

06

The Experience Advantage:
why experience drives growth

Why I built this training

Why me?

Client Services has been my career. I've lived it in different agencies small and large, and this is the training I wish I'd had. Built from experience & years of fine tuning the 'craft'.

Why now?

Clients have more options and less patience than they used to. Delivery alone doesn't hold a relationship anymore - experience does. Most agencies' training hasn't kept pace with it.

Why this?

Client Unlock isn't a generic framework. It's the six pieces of the puzzle I've seen client teams need, across different agencies - put together properly. It leaves room to tailor to your clients & your agency.

From Service to Strategy

THE 'SHIFT' THAT'S CHANGED EVERYTHING

Client teams were built to deliver - manage the relationship, the brief, keep the client happy. They still do.

But what agencies and clients now need from Client teams has moved on, yet the training and structure haven't kept pace.

The agencies pulling ahead aren't just winning new business, they're unlocking growth already sitting in their existing clients.

This isn't about turning Client teams into sales experts. It's giving them what they need to grow the clients they already have - maximising experience and revenue, not just delivery.



Success
looks like...

A client team that leads, not just delivers

Client Unlock builds the team every agency wants...

- ✓ Commercially confident
- ✓ Comfortable in the hard conversations
- ✓ Consistent in client experience

Who's it right for?

If you own a client relationship
and you're responsible for
growing it, this is for you.

*Account Managers, Account
Directors, Client Relationship
Managers, Client Partners, Heads of
CS, but also... Founders, Service
Leads, Channel Experts.*

There's more to share...

CLIENT SERVICES VALUE UNLOCK

A SHORT GUIDE FOR AGENCY LEADERS WHO WANT TO RETAIN & GROW THE CLIENTS THEY ALREADY HAVE

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Value Unlock Guide

Client Unlock

A modular training programme for agencies who want their existing clients to become their biggest growth lever.

Client Unlock is built from six modules. Each one stands alone and solves a specific gap, but together they build the full set of capabilities an agency needs to turn client relationships into sustainable growth. Below is a summary of each, grouped by: **the foundations of confident, consistent client servicing**, and then the capability to **actively grow and elevate the client relationship**.

Part 1: Client Foundations

Before a team can lead a client relationship strategically, they need the basics in place: a consistent way of working, a solid grasp of the commercials, and the confidence to act as an advisor.

Module 1: The Client Servicing Playbook

Client experience shouldn't differ depending on which account it is or who's working on it. This module builds the practical foundations for consistency: account structure, communications & where AI can lighten the load. So every client gets the same standard.

You'll leave with:

- A working 'playbook' outline for one of your live accounts, built in the session.
- Common playbook themes aggregated and shared back with the full team afterwards.
- A clearer view of roles, cadence and communication gaps on your own accounts.
- AI tools and workflows outlined, with one workflow chosen to pilot.

Module 2: Commercial Confidence - knowing the numbers that matter

Confidence with clients starts with confidence in the commercials. This module builds a clear, shared understanding of how work is scoped, priced and protected - so your team can talk about investment and value without underselling, over-promising, or giving away ground they shouldn't.

You'll leave with:

- A shared commercial vocabulary across the team
- Practice handling real scoping and pricing scenarios as a team
- Greater confidence discussing investment and value with clients
- A commercial playbook of key terms and references to use after the session.

Module 3: The 'Delivery to Advisor' Shift

There's a meaningful difference between delivering good work and being seen as a trusted advisor. This module gives your team practical, everyday habits such as understanding the client's business, framing work around business impact, and creating moments that build trust beyond the brief.

You'll leave with:

- A 'client context' template, tested live on one of your own accounts
- A bank of reframed language for reporting impact to clients, not just outputs
- A working sense of where proactive, unbillable moments live - with a few real ones identified on your own accounts to try.

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Module Overview

How it works

Preparation & delivery

Each module begins with a short five-minute intro video, so the prep call can focus on what matters.

The 1hr prep call is where we discuss which elements need tailoring and agree the real examples and content from your agency that will shape the session.

Delivery is a 3.5hr in-person session, followed by a written summary of key takeaways and next steps.

Mentoring

1:1 mentoring slots are available in addition - for individuals who want continued senior support after the session.

Group mentoring options are also available and can be discussed as part of your programme.

Group size: Up to 10 people per session. Bespoke options available for larger teams. Sessions can work across mixed levels - the right mix is something we'll agree on the prep call.

Investment

SINGLE MODULE

£1,500

ANY 3 MODULES

£4,000

save £300

FULL PROGRAMME (All 6)

£8,000

save £1,000

Every agency is at a different stage. The right entry point depends on what you want to unlock.

Your clients are ready. Is your team?

Six modules. Real examples from your agency. Practical tools your team can use from day one. Let's build yours.

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The Practical Bit

Ready to Unlock your clients?

**Modules can be booked individually
or combined into a tailored plan.**

DM, Email or WhatsApp me for the pricing
breakdown, and to work out the right plan for
your team.

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