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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Part 2: Client Experience

With the foundations in place, these modules turn attention to the client relationship itself - handling the moments that test it, deliberate growth, and understanding why good experience will define its future.

Module 4: Straight Talk & Navigating Difficult Conversations

Difficult conversations don't damage client relationships, but avoiding them does. This module builds the confidence to raise scope creep, quality concerns or misaligned expectations constructively, so friction gets resolved rather than left to slowly erode trust.

You'll leave with:

- A practical framework for raising and resolving friction using the '*Kind and Direct*' approach, including a '*Fact, Impact, Solution*' structure to use in real conversations.
- Scripts and openers, tested on your team's current client situations during the session
- Greater confidence addressing issues early, before they escalate.

Module 5: Planning for Existing Client Growth

Growth within existing accounts rarely happens by accident. This module builds a repeatable way to spot whitespace, map stakeholders beyond your usual contacts, and turn unprompted client signals into a clear, prioritised growth plan.

You'll leave with:

- An account growth plan you've tested on one live account
- A 'stakeholder map' template
- The 'first 90-day growth opportunities' identified by the team in the session, aggregated and shared afterwards as a follow up.

Module 6: The Experience Advantage and why experience drives growth

Clients now have more choice and less patience for relationships that don't go beyond delivery. This module makes the case for why experience, (not just the quality of the work) is now the determining factor on whether a client relationship stays and grows. It also maps your agency's own client journey to find where that experience is won or lost.

You'll leave with:

- A clear understanding of why experience drives client growth, now more than ever
- A 'client journey map' template, worked through on one example client
- Priority areas within the client journey to strengthen. Discussed as a group, aggregated and shared afterwards, to work towards creating a single agency view.

Your clients are ready
Is your team?

Training built on 18 years growing and training Client Services, Strategy & Project Management teams at Trunk, Havas and IMA.

Six modules, shared experience, real examples from your agency & practical tools for the team.

How it's delivered

- 1-hour prep call (per module)
- 3.5-hour, in-person session
- Written summary & next steps
- Max.10 people (group size)
- Choose one module, a bespoke combination, or all six
- Mixed seniority welcome - agreed on the prep call.

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