

Strategic Account Management: Infrastructure

David Bowerman, Vice President, Director of Marketing



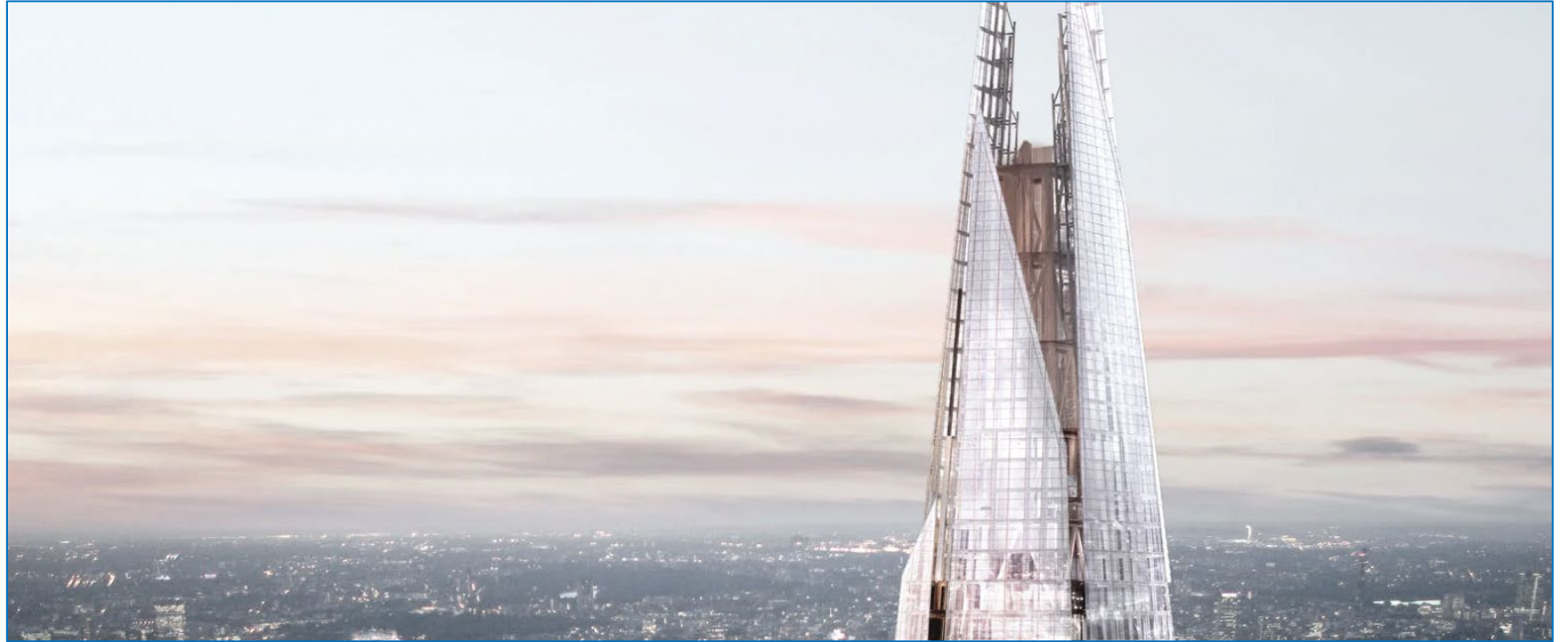
Bay Area Rapid Transit, San Francisco



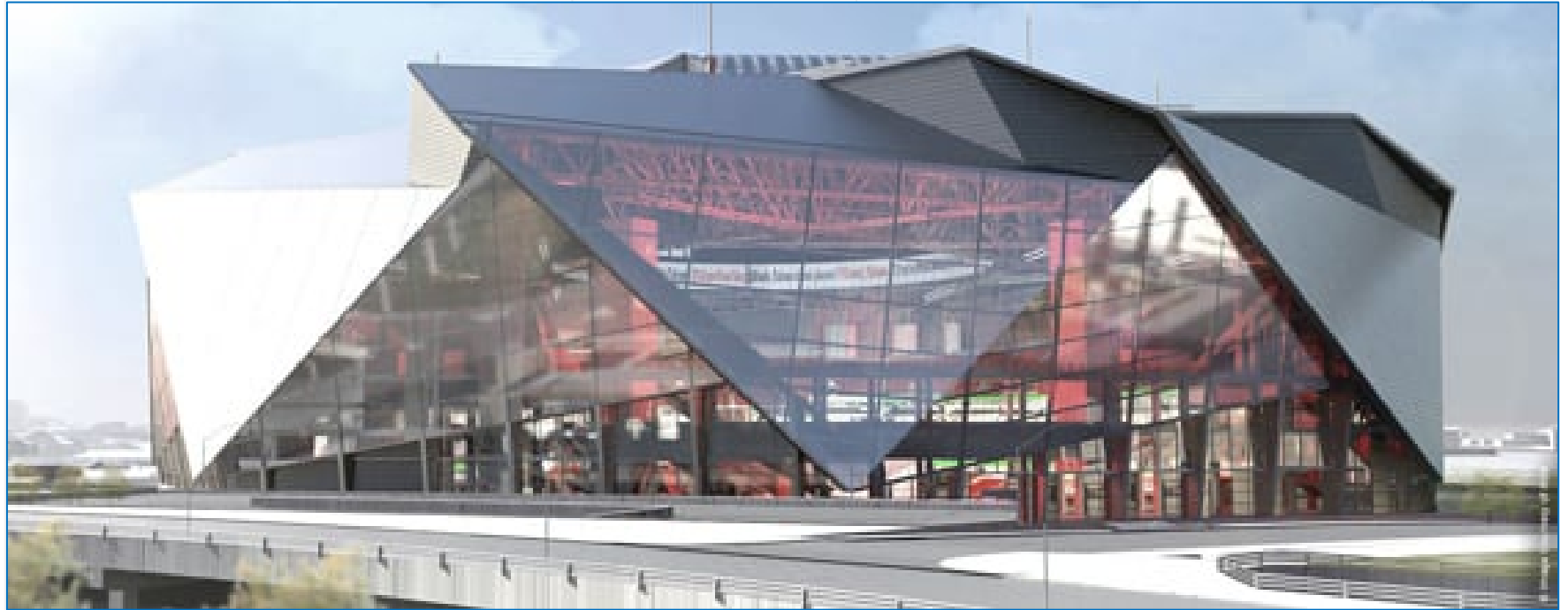
Palm Jumeirah, Dubai



Climate Action Plan, City of Chicago



The Shard, London



Mercedes Benz Stadium, Atlanta



Champlain Hudson PE Transmission Line, Canada-New York



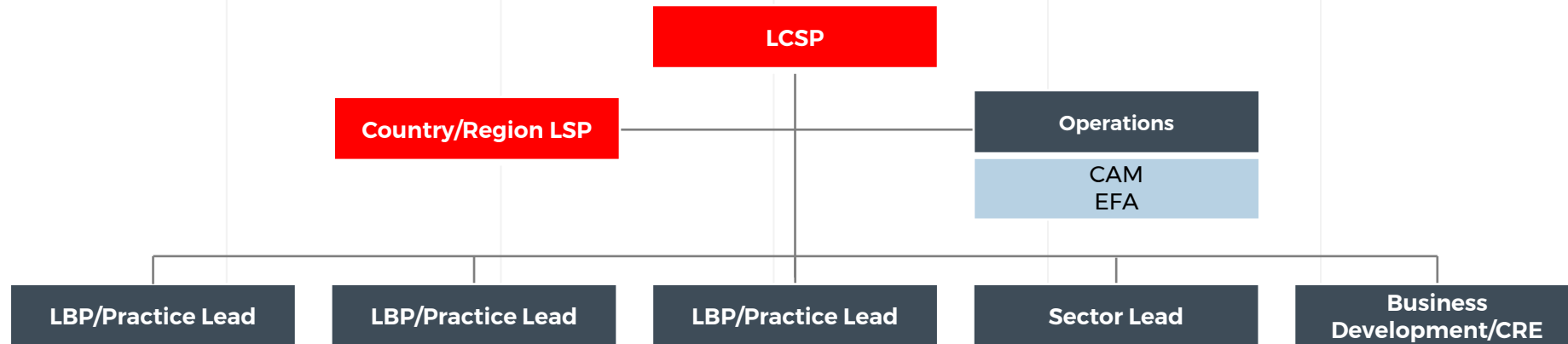
Today

- People + Strategy + Infrastructure
- Six key areas
- Perspective and insights (this is where you come in)
- Have fun!



①

Optimize Roles and Structure



Key Roles

Lead Client Service Partner

Visionary leader who deeply understands the breadth of services offered by the firm; natural dot connector with a focus on collaboration. High EQ, committed to delivery and delighting clients.

Client Account Manager

Operational expert who drives account planning process, compliance, reporting, marketing, onboarding and overall account logistics. Chief of Staff with GSD tattoo.

Engagement Financial Analyst

Account finance and performance, reporting, matter lifecycle, pricing, staffing, risk modeling. Can forecast in their head.

Client Relationship Executive

Account sales leader, relationship builder, horizon scanner, voice of the client. Loves questions that start with “What if...” Builds pursuit teams and filters inbound opportunities. Drivers.

2

Common Playbook

- How you show up for the client
- Client culture, process, expectations
- Aligned for delivery
- Part of strategic plan
- Onboard new team members



3

Direct Investment

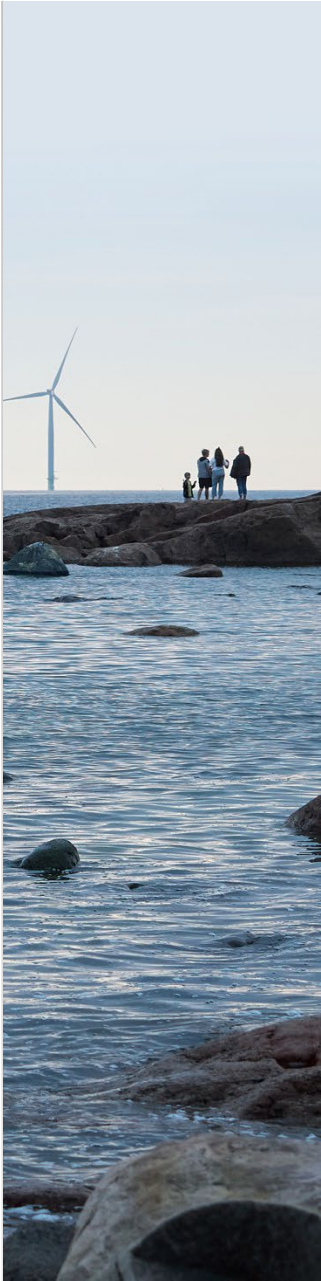
- Funding for innovation and enhanced delivery
- Budget for entertainment, partnering
- Development Labs
- “Grant” funding to offset cost of expansion, new sales



4

Client Feedback

- Client visits
- Formal and informal
- Periodic and ad-hoc
- Ask, Adjust, Reflect, Repeat



5

Account Planning

- Alignment with client's business strategic plans
- Consistent template
- Goals and KPIs by business/practice
- Where is the white space?
- Where can we land and expand?
- Where can we improve operational and delivery efficiency to improve margins, client satisfaction?
- Regular assessments, reporting





Technology

- CRM
- Pipeline
- Account dashboards – SharePoint, Power BI, Tableau
- Collaboration – Teams, Slack, Miro, OneNote, Basecamp
- ERP
- What else?



Thank you

16

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