



**P&K**  
research

**Client Services  
Team Development**

Client Services Learning Site: <https://www.corplearning.com/pk-client-services-team/>

Welcome to your first monthly coaching pulse! Your team will review one coaching pulse per month to ensure that you build on the progress you have made as a team.

In this first pulse, let's review some of the gains you created:

#### Client Services Ground Rules

1. Provide meeting agendas to all with enough lead time to prepare if needed
2. For any given topic, set expectations for what is to be done with the information
3. Bring strategists in on early-stage involvement with proposal development
4. Continually update proposal document to avoid confusion and mistakes
5. Ensure 2-way communication and open dialogue on how involved everyone should be and who is doing what for a project.
6. Engage in a conversation about the project to explain the 'why' behind recommendations/options, it isn't just about early inclusion.
7. Practice a growth mindset. Be open to different ways to accomplish the same goal. Ask for input and ideas: leverage the expertise of strategists and other roles/functions.
8. Initiate a timely conversation on analysis and reporting deliverables and enable best teamwork.

**Group Discussion Question:** How can you work as a team to reinforce these standards that you have created?