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How to hand client relationships over to an account manager

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Handing your client relationships over to an account manager works best when you do it in 4 parts. You design the role first, you write down what that person owns and decides, you hand over client by client, and you keep a senior touchpoint with each client afterwards. It isn't an overnight change, for you or for the client.

Read this online at flexops.co/resources/client-handover-to-account-manager

When an agency owner needs this

The reason for doing this is that it's a key part of getting you out of the day-to-day, so that you stop being the go-to point of contact for certain clients. If you can't do it, there will always be too much reliance on you. You can still work with clients and have a different type of relationship with them, but you can't be the day-to-day person they go to.

If you want to be that person, that's fine, but the agency's growth will probably be capped, at least up to a point. There are some exceptions, because some owners absolutely love that side of the work, and fair play to them.

I don't think it's wise to do it all at once, and it's not wise to think the client will be fine with it overnight. It takes the right person, a role that's been properly designed, and handing things off gradually in a way that doesn't destabilise the business.

When it's done well, you'll have the space to focus on growing the business and not only on keeping it running. When it's done badly, the business wobbles. The team feels unsupported, clients feel the inconsistency, and the owner steps back in too quickly, which often recreates the same situation they were trying to get away from.

Part 1: design the role first

It doesn't matter how good the person is, or how impressive they've been at other companies. If expectations aren't clear, or there's a lack of direction, it's very difficult for great people to come in and have the impact you expect. Nobody is going to do things the same way you did them,

and the way you were doing them probably wasn't that efficient anyway.

So there are 3 things I'd do before anyone starts.

1. Create a role for someone to come into, and not your shoes for them to fill.
2. Be explicitly clear on what success looks like for that role.
3. Be explicitly clear on how them doing it well affects the wider business.

I'd also put the outcome before the tasks. Most role descriptions are a list of tasks with a title on top. I'd lead with what the role takes away from you and what good looks like in 90 days, because the person can then make decisions against it. A line like this does more than a page of tasks: "Owns client reporting end to end. I don't see a report before the client does."

In most agencies, the account manager role ends up looking like this:

- They own the key client relationships and the strategy behind them.
- They oversee delivery for their clients through a system the team follows, and not through micromanagement.
- They lead proactive conversations with clients, so that you hear about a risk before it becomes churn.

To the client, there's 1 face. Internally, that person makes sure the work runs smoothly, without becoming the person who answers every client email themselves, so specialists still answer specialist questions.

A good test of the role description is whether a competent stranger could do the job from the document alone. I'd read it as a new starter would.

Part 2: write down what they own and what they decide

Before anything else, write down the decisions they can make without asking you. If this isn't written down then every decision comes back to you, and you'll have promoted someone into asking for permission.

I'd sort each type of decision into 1 of 3 groups: they decide, they decide and then tell you, or it comes to you. As an example, client reporting might be theirs to decide from day 1, and pricing and scope changes might come to you for now.

Then I'd structure the handover around 3 things.

1. **What they own.** The outcome, and the decisions that come with it.
2. **How you'll both know it's working.** I'd pick a single measure that you both look at.
3. **What you'll stop doing.** Write it down. This is where it usually goes wrong, because the person has the role and the owner still has the habit.

You don't hand over everything, though. I'd keep a fortnightly slot where you review their decisions with them, and the point of it is to review them and not to redo them.

Part 3: hand over client by client

The first thing I'd have you do is list out your clients. If you don't already have some type of client health tracker in place, I'd set one up first, because it shows you which clients are the most valuable. The client health score page covers how.

There are 2 ways to think about the order.

1. You could start with your most important clients, because they're the most valuable and the most important to get right.
2. You could go the other way, which is where I think most people begin, and get the clients that aren't as valuable off your plate first, so that you can focus on a very select number of relationships to begin with.

Personally, I think the second usually makes the most sense, and it's a bit more conservative and safer. What you don't want, though, is to end up still spending huge amounts of time on clients, even if they are the valuable ones. So hand the rest over properly after that, including the ones where you have a personal connection, with the account manager clearly in front.

For each client, I'd note who the account manager is, whether the client could move now, the date you'll introduce them, what you'll step back from, and the date of the first quarterly review.

It also helps to pass your thinking on as you go. What helped an owner I worked with was building their perspective and experience into the team and the system the team would use. The team learned why certain things mattered, why something had changed and why something else needed to be better, and that happened gradually.

Part 4: keep a senior touchpoint

I don't think it's wise to completely extract yourself. The owners who make this change well stay involved and change what they spend their time on, so there's less firefighting and more direction. With clients, the quarterly review is where that happens.

When a client is wondering whether to stay, I think what they tend to remember is the last time someone senior asked them a real question. An owner I work with describes the quarterly review as the way past the marketing contact to the CEO.

Where you can, I'd have 3 levels of their business in the room, which are your day-to-day contact, their manager and the person who signs. Ask for candid feedback directly, and agree a next step before you leave. There's a simple agenda for it on the client health score page.

Where owners get this wrong

Where this goes wrong is when the owner keeps jumping back in after supposedly letting go of the relationship. It's quite tempting to dive back in to take a look, and if you do spot something, I'd log it or raise it in the same way the team would, and let the right person take it from there.

There's more on that in how to get consistent delivery without reviewing everything yourself.

The other one I see is handing over the work without the decisions. The account manager ends up checking everything with you, and you're as involved as you were before.

Questions owners ask about this

How long does it take to hand clients over to an account manager?

It isn't an overnight change, and I wouldn't expect your clients to be fine with it overnight either. Some clients can move quite quickly, and the ones where you have a personal connection usually take longer.

Which clients should I hand over first?

There are 2 ways to do it, and I think the safer one is to start with the clients that aren't as valuable, so that you're left with a small number of relationships to focus on. Your most important clients come after that.

Should the owner still speak to clients after handing them over?

I think so. I wouldn't be in the day-to-day, but I'd stay involved in a quarterly review with each key client, ideally with someone senior on their side in the room as well.

What decisions should an account manager be able to make on their own?

That depends on your agency, but I'd write it down either way. If it isn't written down, every decision tends to come back to the owner.

If you'd like a hand with it

This is the kind of change I work through with agency owners, so if you'd like to talk it through, drop me a note or, by all means, book a call. If you're not sure whether client relationships are the first thing to move, the Agency Health Check will give you a steer.