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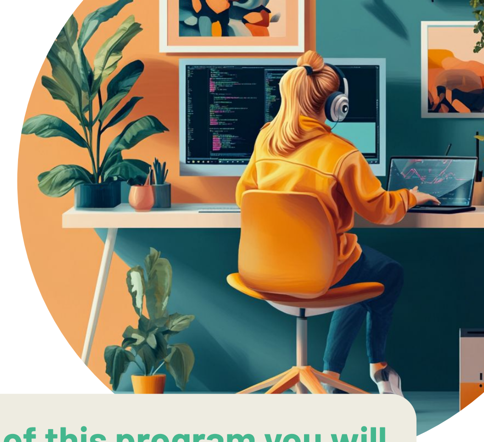
AI for Client Management Mini Lab

Learn how to use AI to get real efficiency gains in meeting prep, research and client conversations.

LEVEL 2 | 25 participants | Virtual or F2F | 4 hours



Why do you need this?

Most teams use AI on a daily basis, but few have dependable ways to transform their client management workflows.

This workshop is a structured, hands-on sprint through the full client management process, from briefs and scoping to meetings, presentations and EOCRs. You'll work with example documents to learn new skills without risking real client work.

You will take home prompt templates and a simple action plan to pilot 2–3 new workflows immediately.

Business Outcomes

- Less time on manual admin and more time on value-adding client conversations.
- Faster, more consistent and sales-driving responses to new client opportunities.
- More proactive opportunity spotting through better use of account and performance data.
- Reduced risk and rework via clearer documentation, scope creep monitoring and on-brand outputs.

By the end of this program you will

1. Accelerate your entire client management workflow with AI.
2. Be able to run, track, and build comms from all of your client and internal meetings.
3. Speed up your reporting and deck-building abilities.
4. Ensure AI outputs stay consistent, on-brand, and strategically sharp.

3.5 hours Average time saved **per manager, per week**

How it works

- A half-day program that takes you through essential AI workflows for client managers.
- Available virtual or face-to-face depending on your team, budget, and learning preferences.
- Two expert facilitators to guide you through with tips, tricks, and examples.
- Hand-on activities designed specifically for client managers, using company authorized tools and tech.
- Includes a takeaway playbook and simple frameworks to repeat the processes and discussions.
- Adapted to your company's AI maturity and specific industry / client requirements.

Smoother Client Relationships

After this half-day session, your client managers will have tighter workflows, refined prompt templates, and more polished client communications, powered by AI.

"Easy to follow, very hands-on, relevant use cases, great moderation by the team"

Türi Cengiz, Publicis DACH

Programme Breakdown

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Intro to AI-Powered Client Mgmt
Overview of how AI assistants and tools are supporting the work of client teams. Set the culture for doing, reflecting, and learning.

Module 1: Explore Possibilities
Map your actual client management workflow and pinpoint where AI might be able to help. Introduce the 'sandbox' project for today.

Module 2: Prep and Comms
Learn how to use AI to summarise chats into meeting briefs, draft agendas and follow-ups, and build tailored stakeholder updates, fast.

Module 3: Delivery and Updates
Speed up time-to-value by using AI to turn messy emails and briefs into clear actions, flag scope creep, and share status updates.

Module 4: Reporting and Growth
AI is a powerful data analyst. Turn performance data into client-ready insights, spot opportunities and draft proposals.

Module 5: Personal Action Plan
Choose 2-3 concrete client tasks and define exactly which AI helpers you'll use in the future, when and how you'll judge success.

Wrap-up
Recap the topics we covered with time for Q&A. Share the final survey which unlocks the *Playbook* takeaway.

Takeaways
AI Playbook for Client Managers with examples and templates. Simple action plan with 2–3 workflows to pilot.

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Building AI Agents for Client Management

Design and launch an AI agent to reduce prep and admin time and sharpen your client comms.

LEVEL 3 | 25 participants | Virtual or F2F | 2x 4 hours

Why do you need this?

Too much value is lost to manual coordination, repetitive follow-ups, and time spent chasing updates, leaving less space for proactive client management.

This hands-on workshop shows how to design, build, and deploy AI agents that support core account tasks.

Your teams leave with a working agent prototype and a clear direction forward.

Business Outcomes

- Offload repetitive work to AI agents.
- Remove bottlenecks in critical workflows.
- Boost team productivity and speed.
- Turn internal knowledge into automated action.
- Integrate agents into your existing tools.
- Strengthen client confidence through smarter AI-enabled execution.

By the end of this program you will

1. Understand the capabilities and limitations of AI Agents.
2. Identify and prioritize high-value AI Agent use cases for client management work.
3. Design and build a working AI Agent prototype using your authorized tools.
4. Leave with a clear plan for building and scaling AI Agents in your client team.

Delivered in your tech stack:

90% of participants created an AI agent to speed up productivity

Building AI Agents for Client Management

How it works

- Structured workflow that takes you from idea to deployment of an AI agent to help sales better prepare for client meetings.
- Two expert facilitators to guide you through with tips, tricks, and examples.
- Hand-on activities using your company authorized agent builder.
- Application task between sessions to embed the *doing* into your work.
- Includes a takeaway prompt pack and simple frameworks to repeat the process.
- Adapted to your AI maturity and industry.

Application Task

Participants work in small groups to build **Client Research Agents** that can, for example:

- Synthesize client context, account history, and current priorities into a pre-populated briefing document.
- Prepare meeting notes, agendas, and discussion prompts for client conversations.
- Work with meeting records and transcriptions for suggested follow up.

Learner Journey

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Part 1: Design & Build (4 hours)

1. Intro to AI Agents

Learn what AI agents are, where they deliver value, and how they differ from AI assistants. Introduce the 'client managers' brief.

2. Define your Agent

Map your client workflows to come up with high impact ideas. Then create a clear Agent use case and map out its scope, role, etc.

3. Give your Agent A Brain

Ground your agent in relevant context and knowledge. Give it SoWs, decks, reports and client profiling to train it on what you know.

4. Give your Agent Tools

Connect your agent to internal tools and systems. Define triggers, actions, and workflows so the agent can take action.

Part 2: Optimize & Deploy (4 hours)

5. Rebuild your Agent

Take feedback from testing with your team and peers, and run through the Agent build process again, refining and improving.

6. Test and Optimize your Agent

Test your agent against realistic scenarios then finalise its prompts, rules, and guardrails to improve reliability and performance.

7. Live Demos

Demo your working agents to the group. Reflect and share lessons learned. Get extra power user tips from the expert facilitators.

8. Roadmap

Identify your next priority agent opportunities and define a clear, practical plan for piloting and scaling agents in your client team.