



EUCIP
European Certification of
Informatics Professionals

EUCIP Client Manager

Elective Level Profile Specification

Version 2.4, February 2007

Short Description

A EUCIP Client Manager is expected to combine a broad knowledge of ICT and information systems with advanced marketing, planning and account management concepts. Essential skills include the ability to negotiate and convince, as well as to monitor the quality of products and services provided to the client, either in single projects or in ongoing service contracts, up to ASP.

This profile requires a minimum work experience of **18** months in a compatible job role; if this requirement is not fulfilled, the candidate might be certified as an **Associate** Client Manager.

Tasks Overview

As part of a supplier company (hardware, IT infrastructure, DBMS and operating systems, security and maintenance tools, system application software, services such as project delivery, facility management and outsourcing) is in charge of the management and development of business relationships with customer organisations.

Based on a significant experience in customer relationships, shares with the client common business plans and actions planned to achieve goals. Presents an integrated offering package consisting of products, services and complex solutions. Evaluates with decision-makers in the client organization a feasible investment plan and defines an accurate and comprehensive investment plan in hardware, software and services.

Focusing on a personal business relations portfolio (generally focused on a specific market sector / area) has the responsibility to maintain relationship with customers, prospects and stakeholders in order to define an appropriate offering based on company delivery portfolio.

Maintains up-to-date information on market dynamics and trends, strengths and weaknesses of own offering, competitors and potential partners actions. Defines and maintains appropriate sales strategies to reach business objectives and revenue targets.

Founding his/her proposals on an accurate and deep knowledge of the reference markets, the customer and its strategies, anticipates changes, suggests and designs new technology solutions or plans for reengineering of customer internal processes.

Exhibits exceptional business insight and executive level presence across all lines of a customer's business. Demonstrates deep understanding of the customer's business, organisation, culture, pain points, and compelling reasons to act. Creates, articulates, and sells an innovative business vision and value proposition.

Uses the full capabilities of own company and partners; so that customer executives clearly grasp the short and long-term business and financial value of a relationship with the supplier.

Identifies opportunities for new projects, maintenance of existing systems, application management for running systems.

Hence, works with more focused managers in charge, respectively, of specific competences on application solutions, information systems architecture, system networking, data centre maintenance, etc....

Orchestrates vendor and partners resources; builds and develops high-performing teams that bring the right expertise in front of the customer at the right time.

Maintains an in-depth knowledge of competitive offerings, strategies, plans and effectively differentiates company offerings from competitive alternatives to create customer preference for the own corporation.

Works with business and IT consultants. Has a clear understanding of the IT implications of business strategy issues and is aware of planning and management control techniques. Identifies legal, privacy, security and other regulatory impacts on information systems.

Promotes change management actions to assure effectiveness of information systems projects.

Uses planning, budgeting and control techniques. Applies selling techniques, engagement, contract and negotiation practices. Points out the relationships between technology offering and business needs, proposes credible solutions and road maps.

Essential Behavioural Skills [5]¹

The Client Manager role requires initiative, flexibility and an exceptional ability to communicate and interact effectively (in both oral and written form) with customers, colleagues, users and managers: this should include an excellent organizational sensitivity, leadership in information acquisition, as much as the ability to plan, organize, make decisions, provide direction and follow-up.

Another essential set of skills includes the ability to gain credibility, to identify priorities, to influence, to persuade and to negotiate even under stressful conditions: a persistent goal-oriented approach in a strategic perspective has to be combined with strong attention to the present and a focus on practical results.

¹ numbers in brackets represent EUCIP points

Detailed Skills Required

Deep competence level [16]

A1. 10 Marketing of IT products and services [2,5]

- Apply business-to-business marketing and sales strategies for IT products and services to different market sectors, including:
 - o primary sector and mineral industry,
 - o construction industry,
 - o manufacturing (e.g. industrial equipment, consumer packaged goods,..),
 - o wholesale and retail trade,
 - o transportation / communications / utilities,
 - o financial services,
 - o entertainment / other services,
 - o public administration.
- Appreciate the impact on sales processes of different jurisdictions and tax systems, including specific laws on contracts, IT suppliers and labour regulations wherever applicable.
- Promote the employing organisation, its IT products and services through a proactive collaboration with the marketing department in the following areas:
 - o corporate image, public relation and communication,
 - o market researches and product marketing,
 - o identification of business drivers;
 - o competitive positioning,
 - o development of long term objectives.
- Play an active role in defining and deploying:
 - o marketing campaigns,
 - o definition of prices and discounts, preparation of standard quotations,
 - o classification and management of business opportunities,
 - o sales analysis, forecasting and resource planning.
- Analyse target markets, also using Business Intelligence tools to classify, segment and evaluate potential targets.
- Analyse competitors, their offering and market presence.
- Use SWOT Analysis to position IT products and services offered to the market.
- Appreciate the importance of an integrated view of customers and trading partners through Data Warehouse and Data Marts.
- Manage customers databases and qualify specific potential clients, opportunities and required actions in the ideal sales process.

A3. 06 Customer and contract acquisition [2]

- Analyze and qualify leads, suspects and prospects reported through various sources (fairs, telemarketing, web marketing, ..).
- Qualify a prospect by analyzing a single sales opportunity and taking into account the following factors:
 - o Potential customer value for the supplying organisation,
 - o How the proposed contract relates to the customer's CSFs,
 - o Customer's financial position, credit worthiness,

- Active reference value.
- Collect information about potential customer organisation and perform customer intelligence.
- Manage complex sales cycles:
 - needs analysis and solution proposal (including technical annexes),
 - risk/cost estimation and margin control,
 - positioning, qualification and possible demonstrations of the solution,
 - proposal / tender preparation,
 - proposal presentation and contract finalisation,
 - Outcome analysis (win & loss).

A3.04 Customer management and retention [2]

- Describe typical business processes and procedures in the following areas:
 - sales order entry, both for standard products / services and for configured products /with custom features and options,
 - sales order control, allocation of stock, shipment and invoicing,
 - customer service, accounting and billing,
 - accounts receivable: sales, invoicing, credit collection,
 - sales commission management.
- Check customer's financial position, credit limit and current exposure.
- Evaluate potential disadvantages in case of failed customer retention.
- Understand the usage of specific IT tools supporting the sales cycle, such as SFA systems (sales force automation).
- Discuss how to use an accounting and reporting system (chart of accounts, cost centres etc.) in order to track specific sales accounts and to measure sales volumes and profitability based on specific performance indicators.
- Apply a procedure for regular monitoring of customer's satisfaction and needs (i.e. sales opportunities) in accordance with possible corporate standards defined by the employing organisation.
- Apply the concept of cross selling and evaluate related advantages for the customer ("one stop shop") and for the supplier (increased sales volumes, ..).

A6.05 Selling techniques [2]

- Manage introductions and establish an initial relationship based on a positive approach.
- Identify key people, opinion leaders and influencers in the audience.
- Find a trade-off between disclaimers and personal/professional standing and credibility.
- Enforce personal credibility through proper manner and appearance:
 - Displaying confident, relaxed and friendly manner,
 - Presenting a professional appearance,
 - Demonstrating expertise and understanding of contents,
 - Ability to relate concepts to the experience of the audience.
- Appreciate the importance of listening to assist communication.

- Appreciate non-verbal communication:
 - o Using non-verbal methods to enhance communication,
 - o Recognising barriers to effective communication.
- Understand human behaviour and underlying motivations.
- Create an empathetic climate and gain the customer's trust.
- Communicate enthusiasm and willingness to innovate.
- Identify customer's priorities and perspectives, match them against own targets and perform conflict resolution.
- Highlight the key messages.
- Respond to unexpected needs and reactions.
- Create a shared vision on possible solutions.
- Understand client's arguments and address them to a positive conclusion.
- Evaluate and apply the appropriate level of psychological pressure to convince the customer.
- Negotiate specific conditions for an acceptable agreement.
- Persuade and support the customer in getting confident with the expected outcome of the agreement.
- Summarize the qualifying aspects of the agreement and make sure that the communication is clear, with no space for misunderstanding.
- Communicate a personal commitment to cover possible open issues and to follow-up.

A1.03 Organisational strategies and related IT system selection [1,5]

- Classify organisations based on their type, internal structure, legal status etc.
- Evaluate the role IT plays in different types of organisation.
- Evaluate the impact of different organisational structures on the management of IT.
- Evaluate Corporate Mission Statements and their IT implications.
- Build a business plan for a particular organisation.
- Evaluate the major techniques for building a business strategy.
- Involve functional managers and key users to identify the key business needs.
- Propose new technical & organizational tools to improve office automation and productivity (e-mail, document/content management, cooperative workflow with external partners).
- Identify IT solutions for factory automation.
- Outline the IT needed to deliver a given business plan.
- Select a portfolio of computer support tools for management of an organisation.
- Contribute to an overall strategy for leveraging of organisational knowledge, memory and learning.
- Use well-known decision making and problem solving techniques.
- Select suitable Management Information Systems (MIS) software for an organisation.
- Evaluate the usefulness of different IT-based workflow systems.
- Compare the effectiveness of virtual team working and physically co-located team working.
- Establish a collaborative structure, using relevant technology.
- Evaluate implementations of collaborative technologies.

- Evaluate the link between an IT strategy and the business strategy.
- Design appropriate matches between organisational need and IT provision.
- Identify the strengths and weaknesses of MIS, On-line Transaction Processing (OLTP) and related system types.
- Contribute to the specification of a Data Warehousing system to support Business Intelligence (analytics) users.

A2.01 Information Systems in the business environment [1,5]

- Explain the nature of Management Information in the planning and control of organisations.
- Define the strategic role of Information Systems (IS).
- Demonstrate a detailed understanding of common business functions.
- Describe why an IS Strategy is needed.
- Contribute to the development of an IS Strategy.
- Relate IS Strategy to Business Strategy.

A3.02 IT organisational structure and measuring business benefits [1,5]

- Evaluate organisational structures for developing and maintaining Information Systems.
- Propose new IT professional skills to meet emerging business or technological requirements.
- Identify responsibilities to comply to emerging needs (e.g. Governance, Security, Media Convergence, Knowledge management etc.).
- Evaluate the “End User Computing” model of development.
- Evaluate the success of Human Resource policies in terms of retention, professional development and recruitment of IS staff.
- Evaluate the effectiveness of Total Quality Management within an IT organisation.
- Propose risk management approaches to risk reduction in the area of quality of IT solutions.
- Implement standard approaches to monitoring and evaluation of IT investments.
- Use TCO as a mechanism for evaluating business benefits.
- Produce outline project plans and business cases (with costs).
- Apply stakeholder analysis to an organisational scenario.
- Produce an Economic Feasibility study for a business project.
- Validate (from the business perspective) a technical feasibility study for a project.
- Produce an Organisational Feasibility study for a business scenario.
- Produce a cost benefit analysis for a business scenario.
- Evaluate an approach used to judge the business value of information and IT.
- Produce a budget for a business scenario, showing typical operational and capital costs.
- Distinguish between tangible and intangible benefits from an IT system, giving examples of each type.

- Use ROI analysis to judge the effectiveness of an IT solution to a business problem.
- Compare and contrast the major methods for evaluation of IT investment.
- Apply standard approaches to benefits management.

A6.01 Managing business change [1,5]

- Develop a communication plan to facilitate organizational changes.
- Foster innovation by an appropriate evaluation system for IT staff.
- Promote training to facilitate the change.
- Identify organizational and technological drivers of resistance to change.
- Understand human behaviour and its impact on business change.
- Create a plan to overcome resistance to change from the business, including “selling” the benefits of new technology.
- Make effective use of Audio-Visual tools in making the case for change within an organisation.
- Explain to non-IT staff the role of IT in achieving corporate aims, and its place within the organisation.
- Ensure that the case for change is presented effectively, using modern delivery techniques.
- Evaluate the Impact of an IT solution on the Business, its Customers/Suppliers, Staff, Internal processes etc.
- Select between Programmes and Projects for Business Change.
- Organise the delivery of user training for both new business processes and the use of any underpinning ICT services.
- Control the interfaces between Business Change projects and enabling IT projects.
- Identify cultural, organisational and business constraints affecting options for change.
- Establish an understanding of business aims and develop alternative processes to achieve them.
- Assess the risks, costs and potential benefits of alternative business process designs.

C7.02 Service management essentials [1,5]

- Establish a proper Service Level Management process and explain its benefits for the organisation.
- Evaluate the main elements of a Service Level Agreement.
- Compare the uses and purposes of Service Level Agreements, underpinning contracts and Operational Level Agreements.
- Negotiate SLA (Service Level Agreement) with internal / external customers and suppliers.
- Identify roles / responsibilities in order to control the actual service level against SLA.
- Promote initiatives for customer satisfaction and benchmarking.
- Set up a proper policy for availability and capacity planning and for IT Service contingency planning.
- Design and assure automatic capture of information for SLA.

Incisive competence level [11]

A2.03 Business Intelligence & Data Warehousing [1,5]

- Identify candidate information for warehousing by using appropriate user needs analysis techniques (e.g. Dimensional Fact Model) at the appropriate level of aggregation (e.g. Business Entities).
- Define the overall architecture of the warehousing system in terms of sources, transformation, storage and distribution.
- Maintain awareness of the appropriate industry solutions and the main vendors in the Business Intelligence field.
- Plan and review Warehousing and Business Intelligence projects in terms of delivered information, information effectiveness, information quality.
- Present the value of business information management in increasing the visibility and exploitation of enterprise data.
- Explain the concepts of Data Base (DB), Data Warehouse (DW), data mart and the importance of dedicated systems for analytical purposes.

A3.01 Accounting and financial management [1]

- Use basic accounting concepts and terminology; e.g. capital, accounts, cash flow, financial cycle, profit/loss, balance sheet.
- Understand the need for management accounting, reporting and financial management.
- Appreciate differing types of cost and methods of costing.
- Understand the principles of budgeting and management control.
- Calculate the requirements in terms of key resources, duration and distribution over time for a given business case.
- Calculate the necessary cost budgets in respect of a business plan
- Understand the basics of cost allocation and variance analysis.
- Measure Business Performance using well known approaches; e.g. turnover/profit, investment appraisal, key financial performance ratios (e.g. ROCE, liquidity).

A4.01 New technology opportunities

and the matching of these to business needs [2]

- Analyse business processes and compare them against alternative solutions proposed by standard software packages (“best practice” approach).
- Evaluate various options for the “virtual organisation” within a business scenario.
- Establish a business case for moving from a “segregated” sales and marketing strategy to the “unique customer” approach in a given organisation.
- Produce a report on the effects of globalisation for an organisation.
- Evaluate the Internet as a tool for creating new opportunities for an organisation.
- Evaluate extranets as a tool for achieving efficiencies in customer/supplier interaction.

- Produce an impact analysis for an organisation related to the increased use of e-business mechanisms.
- Evaluate a project which used IT as the enabler for a significant business change.
- Produce a report documenting the major features of Customer Relationship Management tools.
- Compare the features offered by two major Supply Chain Management packages.
- Evaluate the case for using Enterprise Resource Planning tools for a given business scenario.
- Compare the strengths and weaknesses (from a business viewpoint) of developments in IT technical architectures (e.g. web based vs. "2 tier" client server).
- Evaluate the case for using Document Management systems.

A5.01 Project Management essentials [1,5]

- Define the role of the various specialists in a typical project organisation structure (e.g. according to PMI, IPMA, Rational Unified Process, PRINCE2).
- Contribute to the IS project plan for a given business scenario.
- Contribute to risk analysis of a project proposal, concentrating on business risk.
- Use standard approaches to evaluate a project plan from the business viewpoint.
- Assist in defining the phases within a project and the role of the business analyst in those phases.
- Assist in the creation of constraints and the definition of milestones, checkpoints and reviews for a project.
- Define Corporate Standards for the documentation of business analysis deliverables in a project.
- Contribute to quality assurance processes within a project, from a business perspective.

A4.02 Package selection and implementation lifecycle [1]

- Define a framework for effective package selection.
- Identify, investigate and assess potential package suppliers.
- Evaluate a software package against defined requirements.
- Present recommendations concerning the "fit" of the software package to agreed functional and non functional requirements.
- Evaluate the advantages and disadvantages of the package approach.
- Evaluate the human, technical and financial implications of a decision to outsource development/buy a package solution.
- Apply a checklist of factors to a decision on in house development vs. package procurement.
- Work within a framework for package selection.
- Understand the impact on package selection of Prototyping approaches.
- Acquire an understanding of the software package market in a particular business context.
- Produce a High Level Functional Model for a system.
- Contribute to identifying potential package suppliers.

- Contribute to the production of Invitations to Tender (ITTs) and questionnaires.
- Investigate suppliers.
- Assist in the creation of Supply Contracts and Support Agreements.
- Perform cost comparisons - purchase and support.
- Document the functional match of a package solution.
- Contribute to gap analysis for a package selection.
- Use a weighted scorecard approach to evaluation.
- Present the recommendation for a specific package solution.
- Assist in the implementation of packages.
- Liaise with procurement staff for package purchase.
- Define the modified business processes required in a package solution.
- Appreciate the issues with tailoring the package software.
- Contribute to long term supplier management.
- Appreciate the advantages/disadvantages of packages.

A6.03 Communication professionalism [1]

- Know how to identify the targets and the groups of belongings of the clients of the service.
- Characterize the elements and the individual characteristics that can influence the phone communication and the effectiveness of the service.
- Estimate the importance of the not oral communication on the effectiveness of the service.
- Define standards of answer and management of the interlocutors (announcement of the service, script of acceptance, etc).
- Construct a table to put to disposition of the agents with the main correlations between interlocutors, their characteristics (group of belongings, sex, age...) and the most effective communication modalities (formal vs. informal language, etc.).
- Construct a table to put to disposition of the agents that correlates the competence of the callers (various skill levels: expert, fan, novice, not competent, VIPs, other support center professionals) and the more effective attitudes to assume from the agents.
- Evaluate with the agents the importance of the voice (inflection, volume, tone, rhythm, confidence and clarity, intensity, mirroring, ..) in the different approaches.
- Define the relational competences and transfers the know how and the importance to the agents.
- Define and proposes to the agents how to manage customer expectations during a call.
- Define and proposes to the agents how to handle stress difficult customers and effectively deal with stress.
- Define the correct procedures and modalities for the operating management of the calls (call suspension, putting on hold, call transfer, passage of delivery).

B1.14 System deployment methods [1]

- Organize the deployment of a system, i.e. the delivery of it to the users in the target client organisation.
- Control and understand the business application of artefacts resulting from software development.
- Organise deployment and product roll-out activities; including:
 - o Testing the software in its final operational environment (beta test),
 - o Packaging the software for delivery,
 - o Software distribution,
 - o Data population, both through new data entry activities and through migration from legacy system files or databases,
 - o Training the users.
- Support the client organisation in planning and acting the operational start-up of the new system.
- Organise and control initial support service provision during system start-up.

B1.15 Managing enterprise applications integration [1]

- Explain the characteristics and typical features of enterprise application software in comparison with personal productivity software, system software and web services.
- Identify the actual and potential scope of each of the software applications that compose the Information System (IS) of the target organisation.
- Identify functional overlaps between applications, describe related inefficiencies and risks and propose effective solutions.
- Plan the EAI Project defining the technical and organisation impact in the Company Application.
- Select appropriate EAI tools.
- Promote training for IT staff to assure an appropriate level of competence.

C7.04 Quality and performance standard [1]

- Describe the existing standards for the services (e. g. ISO, EN, UNI).
- Describe the standards or the rules of service defined for the specific operational sector of the company from Standardization Organization or Public Authority.
- Define SLA (service level agreement) with the external subject or internal organizational unit that entrusts the service.
- Negotiate the SLA impact with the units to align the results.
- Defines the performances monitoring system in according with SLA.
- Define the KPIs (key performance indicators) for the units activities fitting the customer need and the company strategy.
- Define the maps of coherence from the different communication channels and the different type of customer interaction.
- Define priority levels and response time of the different customer interaction.
- Define data collect and monitoring procedures.

- Use presentation tools to describe monitoring and gap management procedures.
- Assign specific responsibility for monitoring and gap management procedures.
- Use graphic tools to define the support service delivery procedures.
- Implement the organizational manual to support agents.
- Collaborate with IT departments to develop procedures.
- Organize an appropriate and timely distribution of all relevant information.
- Organise and manage reports on project performances.

External references to SFIA[®] version 3 by the SFIA Foundation

Skill 5: Innovation

“The capability to recognise and exploit business opportunities provided by IT (for example, the Internet), to ensure more efficient and effective performance of organisations, to explore possibilities for new ways of conducting business and organisational processes and to establish new businesses.”

(Level 6)

Skill 40: Benefits Management

“Monitoring for the emergence of anticipated policy benefits (typically specified as part of the business case for a change programme or project). Action (typically by the programme management team) to optimise the business impact of individual and combined benefits.”

Level 5

Skill 41: Stakeholder relationship management

“The coordination of relationships with and between key stakeholders, during the design, management and implementation of business change.”

Level 5

Skill 55: Service level management

“The planning, implementation and control of service provision. This includes negotiation, implementation and monitoring of service level agreements, and the ongoing management of operational facilities to provide the agreed levels of service, seeking continuously and proactively to improve service delivery.”

Levels 4 and 5

Skill 69: Client services management

“Management and control of one or more client service functions, including strategy, support for business development, quality of service and operations.”

Level 5

Skill 75: Account management

“On behalf of an organisation supplying IT products and/or services, the coordination of marketing, selling and delivery activities to one or more customer organisations to achieve satisfaction for the customer and an acceptable business return for the supplier; assistance to the customer organisation to ensure that it gains maximum benefit from the products and services supplied and available.”

Level 5

Skill 77: Selling

“The identification of sales prospects, the development of customer interest, and the preparation, execution and monitoring of sales of any IT product or service into an external or internal market.”

Levels 4 and 5

Skill 2: Consultancy

“The provision of advice, assistance and leadership in any area associated with the planning, procurement, provision, delivery, management, maintenance or effective use of information systems and their environments. The consultancy can deal with one specific aspect of IT and the business, or it can be wide ranging and address strategic business issues.”

Level 5

Skill 7: Strategic application of information systems

“The development or review of an information systems strategy to support an organisation’s business goals and the development of plans to drive forward and manage that strategy. Working with others to embed the strategic management of information systems as part of the management of the organisation.”

Level 5

Skill 38: Change implementation planning and management

“Defining and managing the process of deploying and integrating IT capabilities into the business in a way that is sensitive to, and fully compatible with, business operations.”

Level 5

Skill 49: Financial management for IT

“The overall financial management, control and stewardship of the IT assets and resources used in the provision of IT services, ensuring that all governance, legal and regulatory requirements are complied with.”

Levels 4 and 5

Skill 62: Quality assurance

“The process of ensuring that the agreed quality standards within an organisation are adhered to and that best practice is promulgated throughout the organisation.”

Levels 4 and 5

Skill 76: Marketing

“The research, analysis and stimulation of potential or existing markets for IT products and services, both to provide a sound basis for their development and to generate a satisfactory flow of sales enquiries.”

Levels 4 and 5

External references to AITTS by the German Government – *Arbeitsprozessorientierten Weiterbildung in der IT-Branche*

Profil 6.4: IT Sales Advisor (IT-Vertriebsbeauftragte/r)

“IT Sales Advisor beraten Kunden bei der Auswahl von Services, Hard- und Software und entwickeln gemeinsam mit dem Kunden (individuelle) Lösungen.”

External references to *Nomenclature 2005* by CIGREF (club informatique des grandes entreprises françaises)

(?) Métier 1.1: Consultant en systèmes d’information

*“Il anticipe et fait mûrir les nouveaux projets par une sensibilisation à l’apport des technologies nouvelles et une analyse prospective des processus métiers.
Il assiste la maîtrise d’ouvrage pour la définition des besoins et des solutions à mettre en œuvre, dans un souci de meilleure intégration dans le système d’information d’entreprise.”*