



Memorandum

To: Team Leads and POCs

Re: Key Accounts Management Handling

Date: October 24, 2023

In our ongoing efforts to provide exceptional service to our clients and agencies, it is essential that we maintain a high level of coordination and transparency within our OAC team. To achieve this, we would like to emphasize the importance of effectively monitoring key accounts and ensuring smooth handovers for our clients.

Key Account Monitoring:

Effective from 24th of October all Team Leads and POCs are required to regularly monitor the key accounts assigned to each of the coordinators they are leading. This monitoring includes, but is not limited to:

- **Client and Worker Service Requests:** Ensure that you are aware of any ongoing service requests for key accounts. Stay up to date on the status of these requests and promptly address or report any issues or changes.
- **Client and Worker Changes:** Be vigilant about any changes made to key client or worker information. These changes should be thoroughly documented and communicated as necessary to the relevant parties and the OAC Governance Unit.
- **Policy, Fees, and Pricing Changes:** Ensure that clients and Agencies are informed about changes in cancellation policies, admin fees, pricing, or any other relevant details that affect key accounts. It is crucial to ensure that all changes are communicated and documented accordingly.

Smooth Handovers:

In the event a coordinator assigned to a key account needs to go on leave or is temporarily unavailable, it is the responsibility of the Team Leads and POCs to guarantee a seamless handover to the assigned coordinator or himself. This should involve:

Documentation: Maintain thorough and up-to-date documentation for each key account, which includes account history, client preferences, pending tasks, and any recent changes. This documentation should be easily accessible to other team members.

Communication: Communicate any key updates or changes in the account to the rest of the team and the client, as necessary. Make sure the coordinator provides detailed handover notes to their backup.

Training and Cross-training: Ensure that team members are adequately trained to handle key accounts in the absence of the primary coordinator. If cross-training is essential then make sure to also document the activity.

By adhering to these procedures, we will not only provide a higher level of service to our clients and agencies but also create a work environment that fosters accountability and teamwork.

Thank you for your dedication to maintaining excellence within our OAC team. If you have any questions or need further clarification on these instructions, please do not hesitate to reach out to me.

Please acknowledge through the QR code attached below to indicate your understanding of the details confirmed in this memorandum.

If you have any questions or concerns in relation to this matter, please contact the OAC Governance Unit on OAC-GOVERNANCE@ssfservices.com.au.

SCAN TO REGISTER YOUR ACKNOWLEDGEMENT AND UNDERSTANDING

