

Set and manage ongoing client expectations

Overview

This Standard is about client handling: maintaining a relationship with clients in which they feel confident about the production or post production process and realistic about what it can achieve within the constraints of time and budget.

This Standard could apply to anyone involved with post production.

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Performance criteria

You must be able to:

1. behave ethically in your dealings with clients and develop relationships that demonstrate trust, mutual respect, commitment and cooperation
2. check clients' expectations of projects and your part in them are realistic at the beginning of the project and as it progresses
3. use reliable information to determine clients' levels of understanding of processes and related tasks
4. help clients understand the workflow and schedule and how they are affected by their decisions and information they provide
5. base your decisions and communication to clients on the needs of their project and the expertise you can offer on post production
6. give clients sufficient information for them to understand the feasibility and implications of requests for change that they make
7. feed-back to clients as soon as possible if things occur which will affect schedule, budget or quality propose solutions on which you and clients can agree in terms of cost, process and quality, when changes or extras are required
8. keep records of expectations, conversations and agreed actions in formats expected by your organisation
9. feedback to others inside and outside the organisation, aspects of client relationships that are relevant to them
10. identify opportunities to develop new or existing client relationships that will benefit your organization
11. maintain security of files and other material in line with company requirements

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Knowledge and understanding

You need to know and understand:

1. clients' needs and priorities and how to understand their needs beyond their initial suggestions
2. the workflow, schedule and budget
3. current viewing standards and current professional, national and international standards of delivery and expressions of best practice for the range of platforms and content
4. company criteria and processes for managing client relationships
5. the benefits and disadvantages of different ways of communicating with people and how to communicate clearly both orally and in writing
6. how to anticipate changes in clients' understanding or expectations
7. how to positively communicate necessary adaptations to agreements and changes to products
8. how to present answers to questions and proposals that clients will understand
9. how to identify problems and risks, mitigate risks and what to do when things go wrong
10. how to explain the impact of problems and risks and what is feasible and what is not
11. how to involve clients in joint problem solving
12. how to identify the feasibility and calculate the impact and cost of changes at different stages of projects
13. methods of collaborative working
14. how to act as a moderator between people who take different points of view
15. company systems for storage, back up and security

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