

POWER GOALS

Using Client Experience to Solve Any Business Problem

Ryan Suydam, Chief Experience Officer, Client Savvy











Defining client experience

THE EMOTIONAL REACTION CLIENTS HAVE TO ANY INTERACTION
WITH YOUR BRAND



Why is the heart at the heart of it all?

All You
Gotta Do...



The Problems We All Face



Find

Differentiation

Inconsistent Brand Flag

Market Penetration

Lack of Referrals

Competitors Encroaching

The Problems We All Face



The Problems We All Face

Underperforming Subs

War for Talent

New Hire Integration

Optimizing Staff Assignments

A green hexagon with a blue outline and a white upward-pointing arrow on its top edge. The word 'Staff' is written in white inside the hexagon.

Staff

The Problems We All Face

Disruptive Change-Orders
Difficult Clients
Too Much Fire Fighting
Delivering Quality

Do

The Problems We All Face

Slow Payment
Write-Offs & Mark-Downs
Low Utilization
Too Much Utilization
Value Justification

Paid

The Problems We All Face

Keep



Client Churn

New Client Churn

Succession Planning

Lack of Cross-Selling

1

Listen for
what hurts



2

Probe to
Learn More



3

Prioritize Top Challenge



4

The Solutioning Model



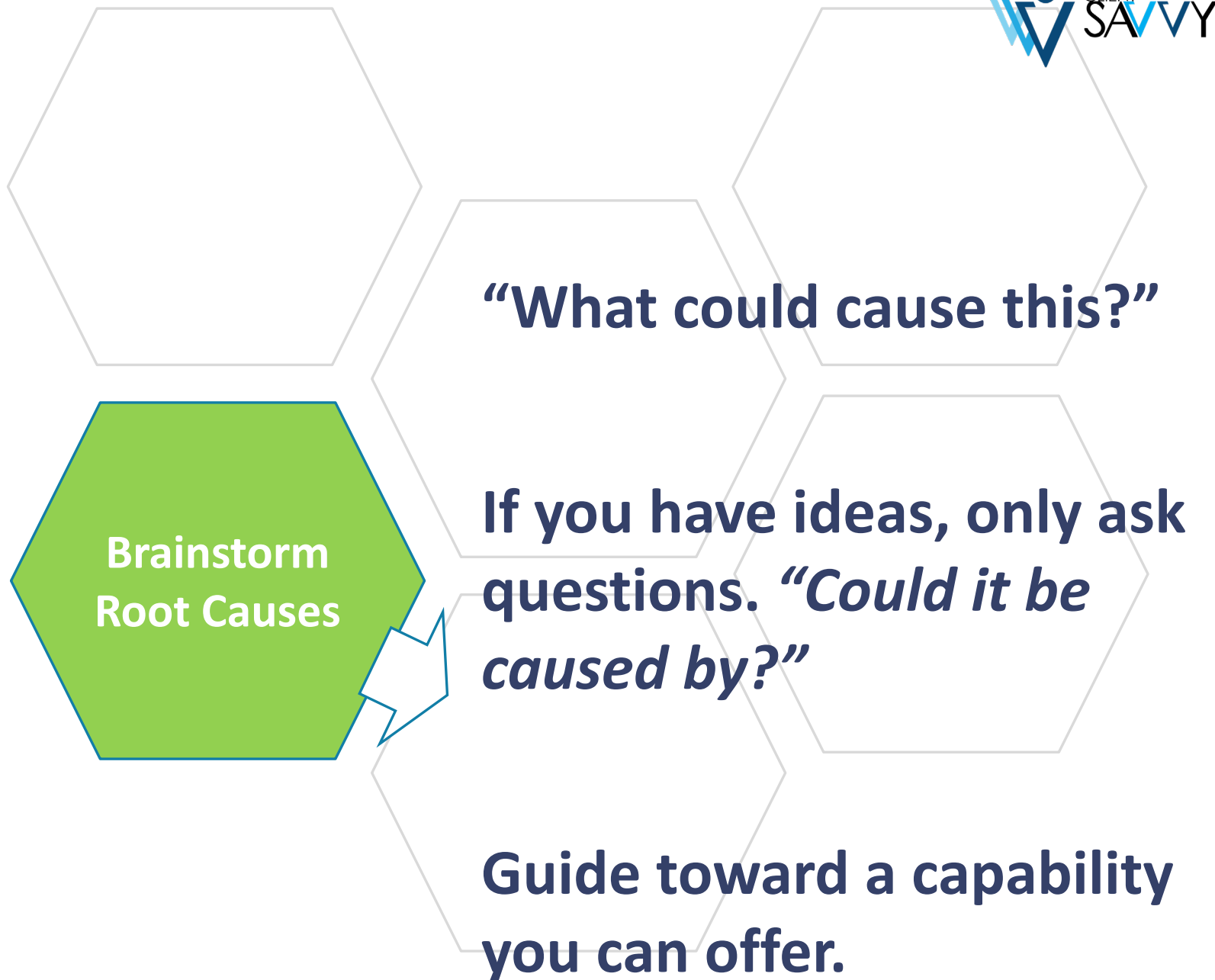
4

The Solutioning Model



4

The Solutioning Model



4

The Solutioning Model

These people will support the solution!

“Could it also impact so-and-so?”

**Identify
Who’s
Impacted**

4

The Solutioning Model

The hardest part! Show your business acumen.

“What does this cost the business?”

“Could it also cost us here? What’s that worth?”

Be conservative! Don’t let anyone argue the numbers.



4

The Solutioning Model

“Have you thought about how to solve this?”

Build an *action vision* of the solution:

SOMEBODY does
SOMETHING when this
HAPPENS in order to
create a **RESULT**.

“*Would it help if....*”

Brainstorm
Solutions

4

The Solutioning Model

A diagram consisting of seven hexagons arranged in a honeycomb pattern. The central hexagon is solid blue and contains the text "Agree to Evaluate". The six surrounding hexagons are white with a thin grey border. The bottom-most hexagon contains a quote in italics.

Agree to
Evaluate

***“If I can put together a
plan to address this
challenge, would you
agree to take a look at it?”***

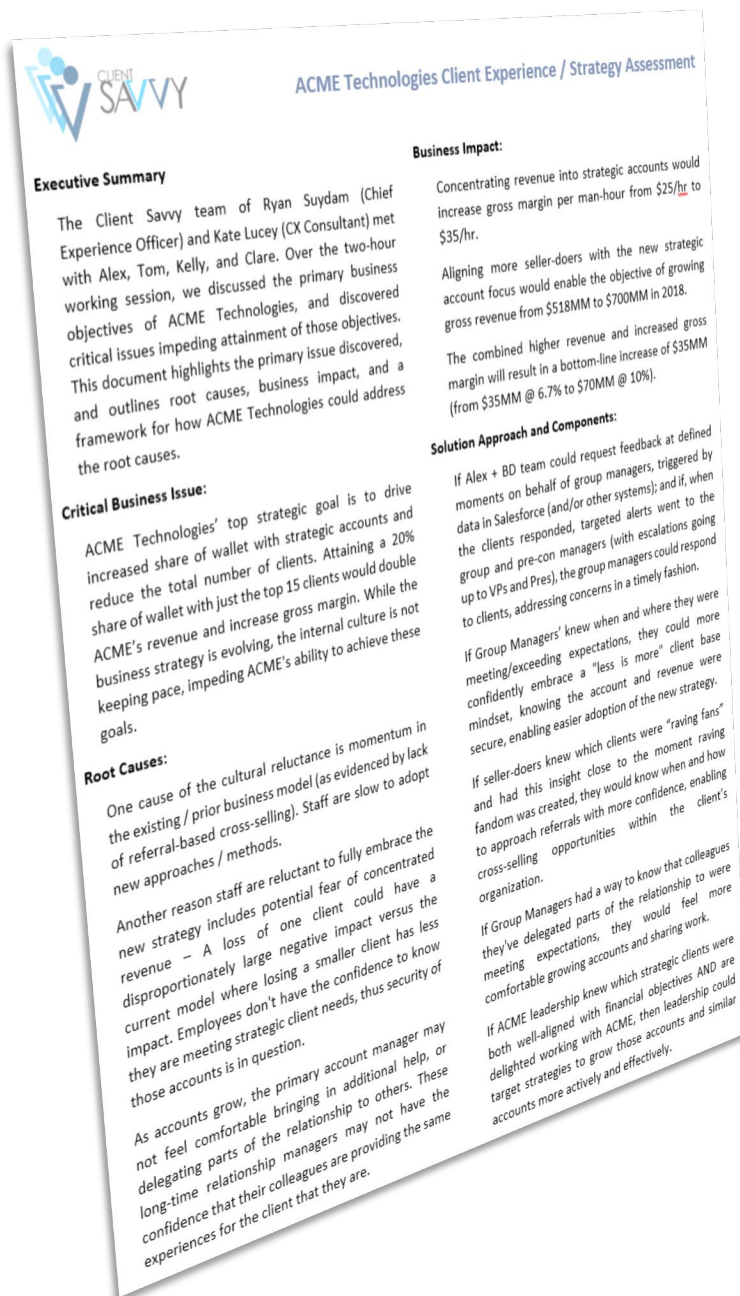
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Create a Plan



6

Write the Story



7

Agree to Implement



8

Measure Progress & Results



9

Complete or Revise the Plan



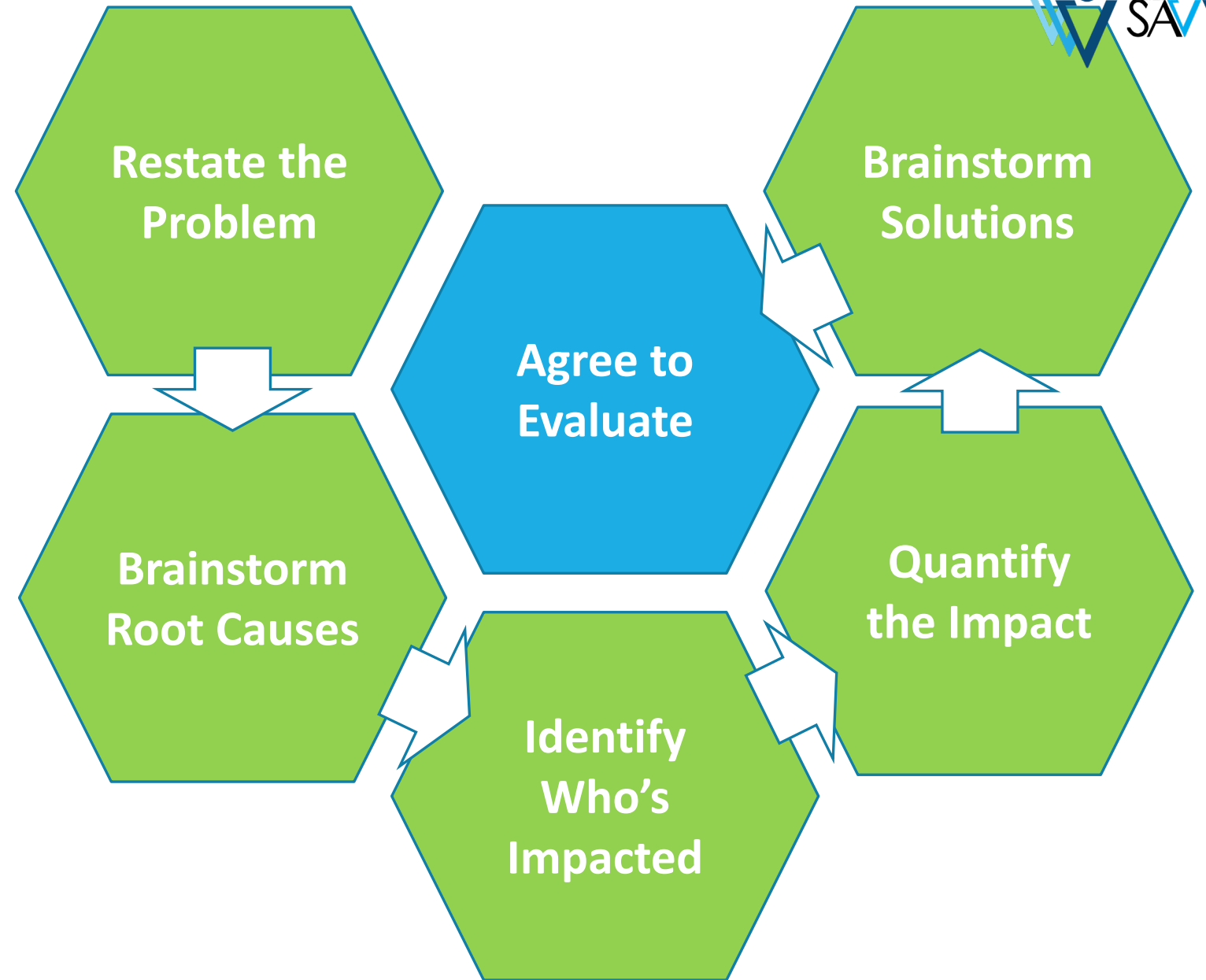
10

Repeat for the
Next Problem
and Grow
Your
Leadership
Role

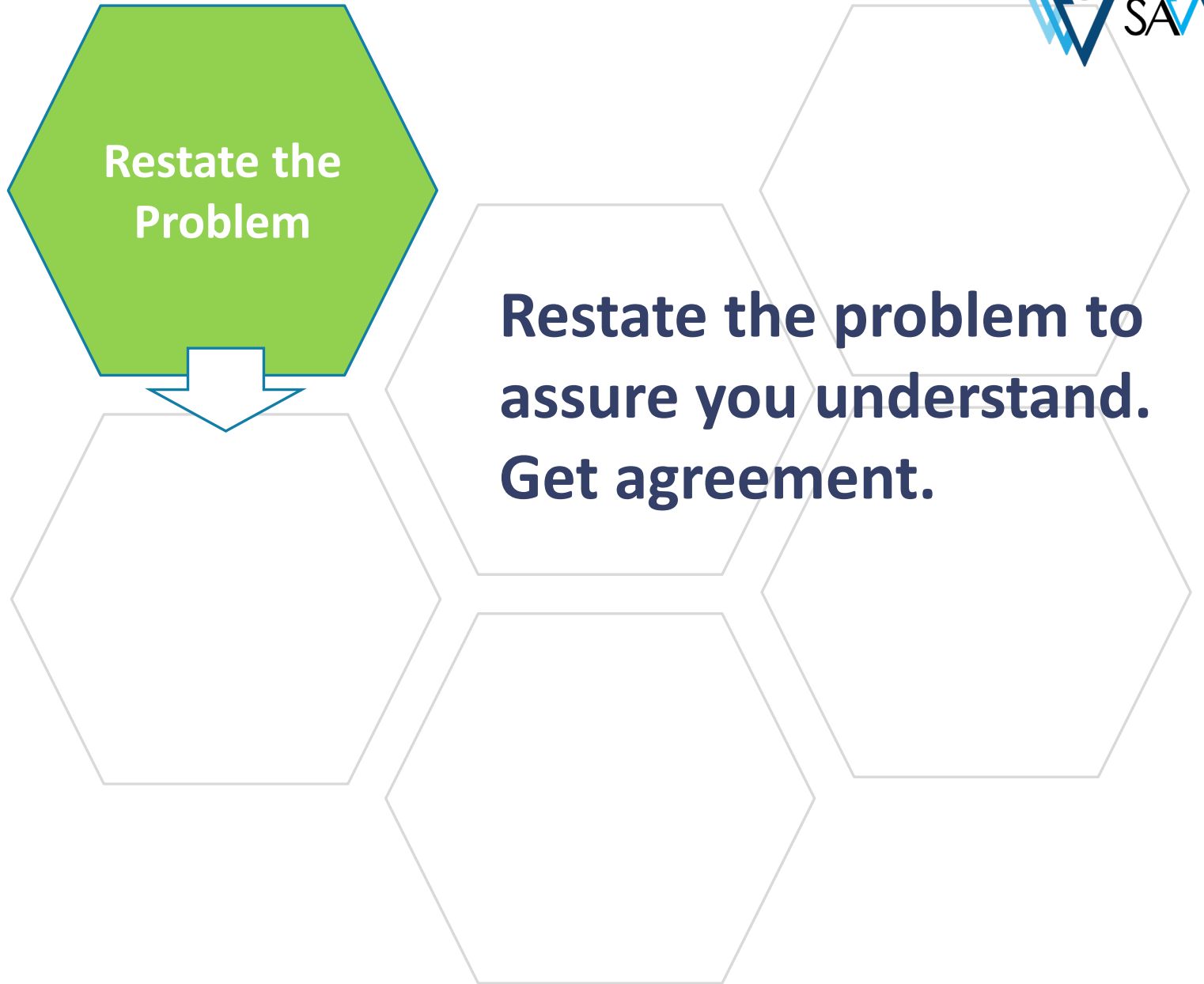


Let's
practice!

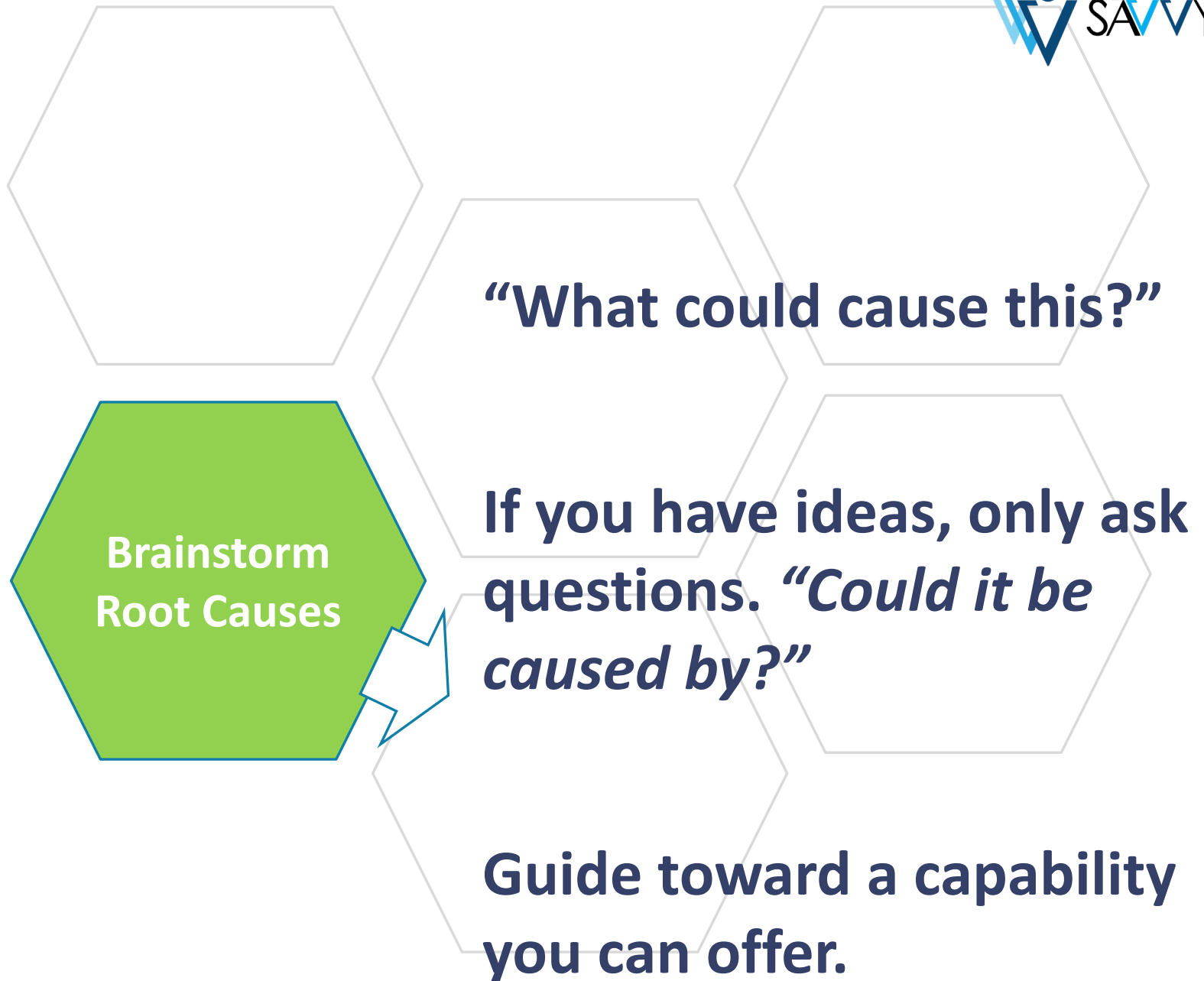
The Solutioning Model



The Solutioning Model



The Solutioning Model



The Solutioning Model

**These people will support
the solution!**

***“Could it also impact so-
and-so?”***

**Identify
Who’s
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The Solutioning Model

**The hardest part! Show
your business acumen.**

**“What does this cost the
business?”**

***“Could it also cost us here?
What’s that worth?”***

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The Solutioning Model

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Build an *action vision* of
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Brainstorm
Solutions

The Solutioning Model

A diagram consisting of seven hexagons arranged in a central cluster. One hexagon in the center is solid blue and contains the text "Agree to Evaluate". The other six hexagons are white with a thin grey border and are empty.

Agree to
Evaluate

***“If I can put together a
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Putting it Together



ACME Technologies Client Experience / Strategy Assessment

Executive Summary

The Client Savvy team of Ryan Suydam (Chief Experience Officer) and Kate Lucey (CX Consultant) met with Alex, Tom, Kelly, and Clare. Over the two-hour working session, we discussed the primary business objectives of ACME Technologies, and discovered critical issues impeding attainment of those objectives. This document highlights the primary issue discovered, and outlines root causes, business impact, and a framework for how ACME Technologies could address the root causes.

Critical Business Issue:

ACME Technologies' top strategic goal is to drive increased share of wallet with strategic accounts and reduce the total number of clients. Attaining a 20% share of wallet with just the top 15 clients would double ACME's revenue and increase gross margin. While the business strategy is evolving, the internal culture is not keeping pace, impeding ACME's ability to achieve these goals.

Root Causes:

One cause of the cultural reluctance is momentum in the existing / prior business model (as evidenced by lack of referral-based cross-selling). Staff are slow to adopt new approaches / methods.

Another reason staff are reluctant to fully embrace the new strategy includes potential fear of concentrated revenue – A loss of one client could have a disproportionately large negative impact versus the current model where losing a smaller client has less impact. Employees don't have the confidence to know they are meeting strategic client needs, thus security of those accounts is in question.

As accounts grow, the primary account manager may not feel comfortable bringing in additional help, or delegating parts of the relationship to others. These long-time relationship managers may not have the confidence that their colleagues are providing the same experiences for the client that they are.

Business Impact:

Concentrating revenue into strategic accounts would increase gross margin per man-hour from \$25/hr to \$35/hr.

Aligning more seller-doers with the new strategic account focus would enable the objective of growing gross revenue from \$518MM to \$700MM in 2018.

The combined higher revenue and increased gross margin will result in a bottom-line increase of \$35MM (from \$35MM @ 6.7% to \$70MM @ 10%).

Solution Approach and Components:

If Alex + BD team could request feedback at defined moments on behalf of group managers, triggered by data in Salesforce (and/or other systems); and if, when the clients responded, targeted alerts went to the group and pre-con managers (with escalations going up to VPs and Pres), the group managers could respond to clients, addressing concerns in a timely fashion.

If Group Managers' knew when and where they were meeting/exceeding expectations, they could more confidently embrace a "less is more" client base mindset, knowing the account and revenue were secure, enabling easier adoption of the new strategy.

If seller-doers knew which clients were "raving fans" and had this insight close to the moment raving fandom was created, they would know when and how to approach referrals with more confidence, enabling cross-selling opportunities within the client's organization.

If Group Managers had a way to know that colleagues they've delegated parts of the relationship to were meeting expectations, they would feel more comfortable growing accounts and sharing work.

If ACME leadership knew which strategic clients were both well-aligned with financial objectives AND delighted working with ACME, then leadership could target strategies to grow those accounts and similar accounts more actively and effectively.

Putting it Together

Executive Summary

Executive Summary

Over the course of three 2-hour working sessions, the leadership team met at ACME Engineering identified and examined the firm's primary business objectives. During these meetings, they discovered critical issues that are impeding attainment of those objectives. This document highlights the primary issue discovered, and outlines root causes, business impact, and a framework for how ACME Engineering could address the root causes.

Putting it Together

Critical Business Issue

Critical Business Issue:

ACME Engineering's top strategic goal is to increase their share of wallet in a growing and strategic market sector. The firm has evolved into being perceived as a leader in providing services in this market area. However, the firm is also in the midst of leadership transition. And, it has been challenging to build alignment among all members of the team for this vision.

Putting it Together

Root Causes

Root Causes:

One cause of the lack of alignment is the difficulty in letting go of some clients that, while holding the position of long-time clients (and friends) do not fit with the new growth model of the business. The small projects typically associated with these clients consume resource allocation that is out of alignment with the financial goals of the firm.

Another reason is a change in the communication structure that has taken place as leadership transitions. The firm has gone from five members of the leadership team to eight. And, without a clear framework of communication, some members of the original leadership team are feeling displaced. Used to a decision-making process that made it possible for everyone to bring their ideas for open discussion, the addition of new members to the team has adjusted the weekly meeting agenda.

With the restructuring that has taken place during the leadership transition, there are some members of the leadership team that are unintentionally creating bottlenecks in delivery. This has also resulted in inefficiency as team members find themselves having to reacquaint themselves with projects when meetings are rescheduled.

Putting it Together

Business Impact

Business Impact:

Increasing the firm's share of wallet with this growing and strategic market would increase firm's position in the industry and potentially increase gross revenue from \$15MM to \$22MM in 2019.

Aligning the communication framework within the leadership team and developing a structure where all leadership roles have a primary and secondary contact would reduce or eliminate the project bottlenecks. This would reduce wasted manhours, saving up to \$430K per year and allow the firm to maintain profitability levels by not needing to hire additional staff to get the work done.

Putting it Together

Solution and Approach

Solution Approach and Components:

Working with Client Savvy, the leadership team identified a need to develop an “Ideal Client Profile” making use of metrics to quantify the value of a client and guide consistent selection criteria when intaking work. ACME Engineers needs a clear understanding of the Client Lifetime Value (CLV – the aggregated profit of the client over the life of the relationship) and clear insights into client sentiment and loyalty indicators. By aggregating these two insights, the leaders will know which clients to focus growth efforts on, and which to diminish services with.

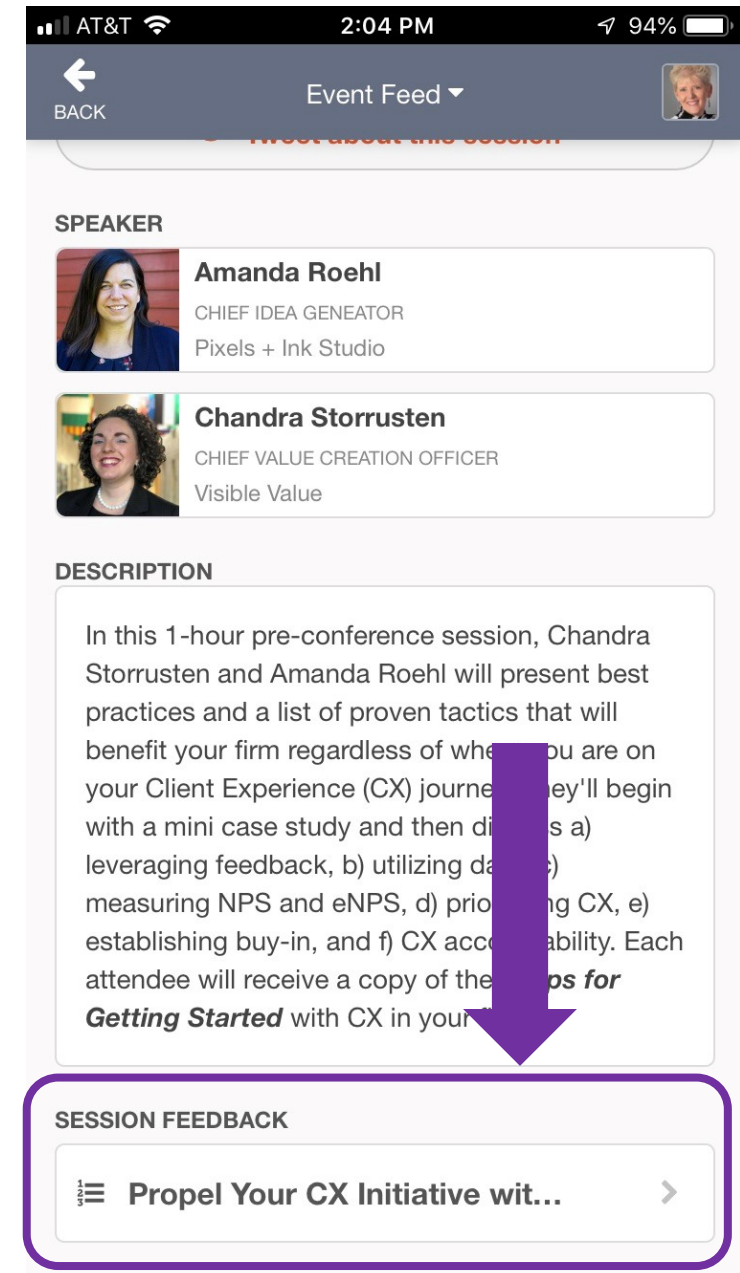
Further, the leadership team agreed to create a Journey Map of their decision-making process for each of the internal stakeholders. This map makes clear how each stakeholder arrives at a need to make a decision, and who/how they interact with others to arrive at the decision. Once the decision journey map is complete, a decision-making framework will be communicated to the broader staff, so all members of the team are informed and enabled to get answers when needed.

Measure Progress & Results



Please give us your feedback.
The more you give, *the more points* you will receive!

Home...Agenda...Session
...bottom of screen





Solving any problem with client experience

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