

A large yellow offshore oil rig stands in the blue ocean under a clear sky. The rig is a complex structure with multiple levels, pipes, and a tall crane. The image is partially framed by a large white arrow pointing right, which is set against a blue background.

THE CYCLE OF CLIENT FEEDBACK: 10 YEARS OF EXPERIENCE

By : Lee Jordan

May 22, 2019

GATE
ENERGY

Who Am I & Why Am I Here?

- A little over 10 Years Ago I was asked to implement a Client Feedback Program for a 20-person engineering team.....
- Much has happened since then, but today we are still using the same tool.....
- I would like to share my journey and my learnings with you today



Lee Jordan, COO



**450 Employees,
Based in Houston, TX**

Context

- **GATE provides consulting, staffing and field services to the oil and gas industry**
 - Based in Houston, TX
 - Offices in Texas, Louisiana and Singapore



- Projects that run from \$1,000 to \$20 million
- Our Client Feedback program covers all aspects of our business

I'm a mechanical engineer at heart – that means I approach every problem like has one of two solutions...

Option 1



Option 2





AGENDA

- Birth of the Program
- Initial Growth and Missteps
- Adolescence and The Illusion of Progress
- Coming of Age
- Trials and Tribulations
- Changing of the Guard





The Birth of the Program

- Let me take you back to 2008.....





A New Partner

- **Project managers requested and received Client feedback face to face and ad-hoc**
- **In late 2008, we had an outside consultancy evaluate our operations**
 - They interviewed 11 key clients and gave us their feedback
- **It was all good, so we didn't think much more about it.....**
 - We already knew we were good!

2. I am going to list some performance categories. Please indicate if they are a strength or weakness for GATE by rating each on a scale of 1-5, with 1 being a lowest (a weakness) and 5 being the highest (a strength). Also, please tell us why you see them as such.

Category	Rating	Comments
Responsiveness	4	They've been as timely in responding to our needs as they could be.
Communications	5	There is a weekly memo for the project that's nice. They almost over communicate.
Technical abilities	5	GATE is a technically strong organization.
Understanding of your business	4	They understand my business well.
Project management	4	I don't think of it in terms of a project. It is more operations.
Quality of service	5	We get a great service from them.
Value for fees	4	They provide good technical support at a competitive rate.
Ability to meet deadlines	5	They meet our deadlines.
Knowledge of appropriate industry codes and standards	4	If they don't know, they eventually do the research and then know.

Some Resistance...

- **Into early 2009, as our reputation and business grew, we started meeting many more prospective Clients than we had ever met before**
 - We talked about our technical capabilities and our level of service
 - They assumed we were lying about the service part, just like everyone else seemed to!



Drifting Apart...

- **We showed them the feedback data and they started to believe us**
 - We started to reel in some good catches for about 3 months
 - Then the data started to lose its freshness.....





On the Market

- **We decided we needed to refresh the data – but this was far from a unanimous decision**
 - I was one of the project managers strongly against the idea
 - We **knew** our Clients were busy
 - We **knew** they didn't want to receive more emails
 - We **knew** that they wouldn't respond

On the Market

- **I was told I would be the one to find a way to make it happen**
 - The sensible path for an ongoing program was something self-maintained
 - Free tools needed manual data tracking and review that were too time-consuming
 - That meant a dedicated online tool



Making a Commitment

- **When we found a suitable partner, they guided us through what to expect**
 - Covered how to use the tool and how to interpret the information
 - Covered basic questions on use and maintenance



Some Cold Feet.....

- **We had to work out how to make it a part of our daily life**
 - Everyone had a starting position that it was a great tool and that everyone should use it
 -except for them
 -because 'reasons'
- **I Decided To Be Persuasive!!**



OM: Incentive Compensation Program

Where Project Managers show a sustained lack of compliance with the requirements outlined below, this will result in a reduction in their Project Management Value banding. Similarly, where Line Managers show a sustained lack of compliance with their equivalent requirements, this will result in a reduction in their Line Management Value banding (as described in Section 8.7).

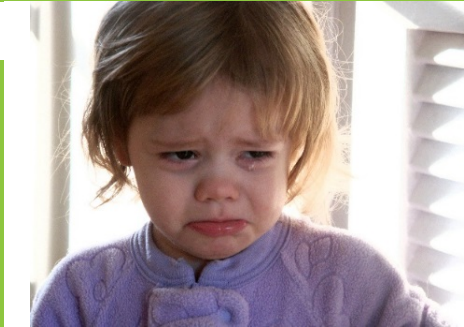
Hence, Project Managers and Line Managers face a greater penalty associated with a lack of compliance to GATE Visions and Operating Practices than do the rest of our staff. This reflects the increased impact that Project Managers and Line Managers have on the development of other staff and on ensuring that the GATE Vision is applied to all staff and all parts of the Company.

Compliance Items:

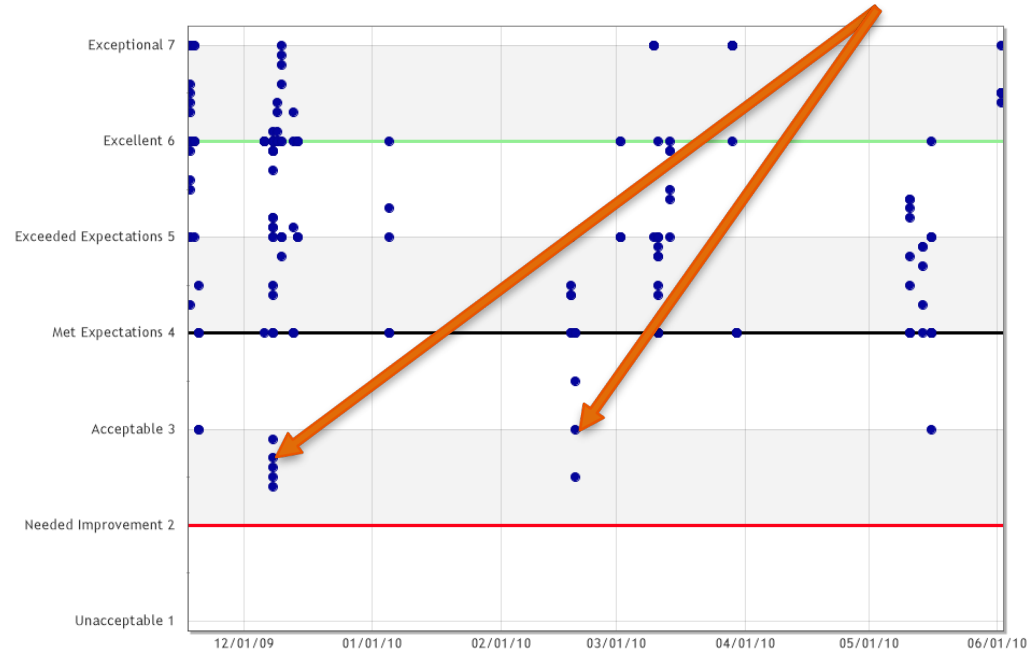
- Supports billing resolution and follow-up.
- Project documentation correct.
- Projects on budget or to agreed extensions.
- Project milestones and due dates met.
- Staff mentoring and development opportunities provided.
- Positive Client feedback received (either using Client feedback tool or direct communication).
- Positive GATE staff feedback received.
- Quality audits supported and no major deficiencies in project quality identified.

The Early Days

Unsurprisingly,
people found that
they were
competitive and
liked praise, and so
were in a hurry to
send surveys



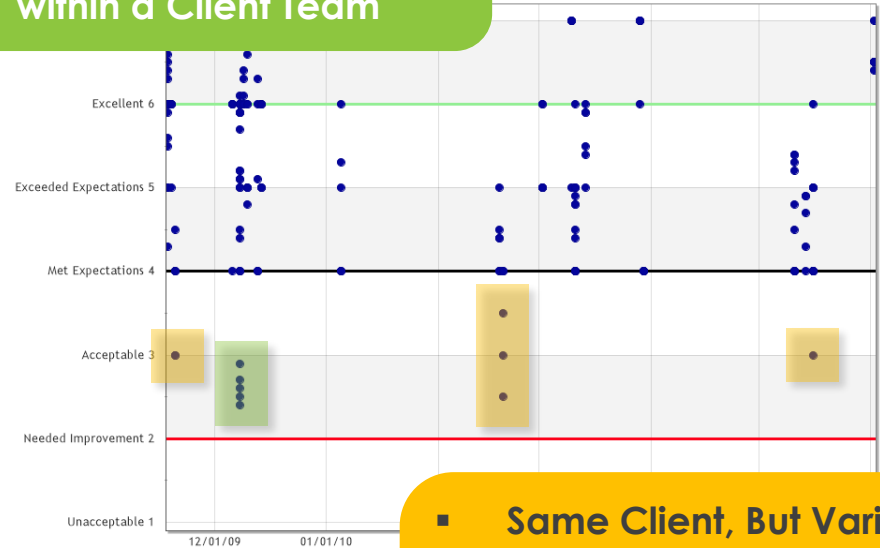
But we had
some tears
too!



But We Were Great!

Why The Low Scores?

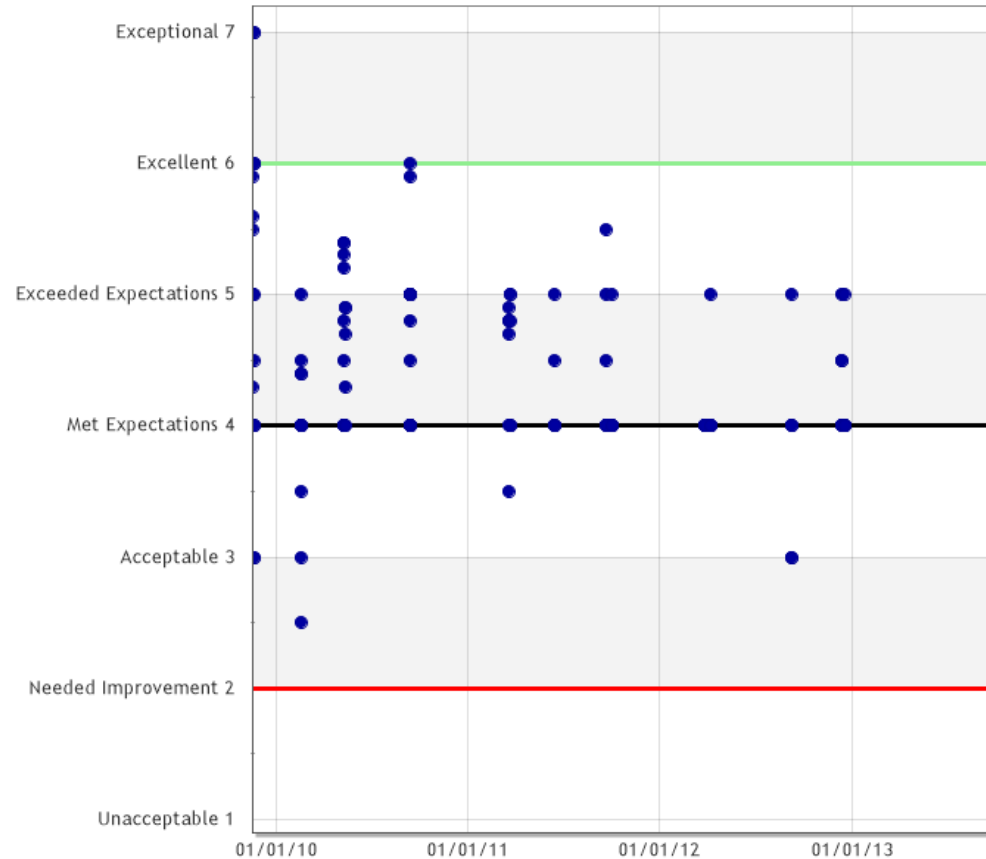
- Internal communication/miscommunication within a Client Team

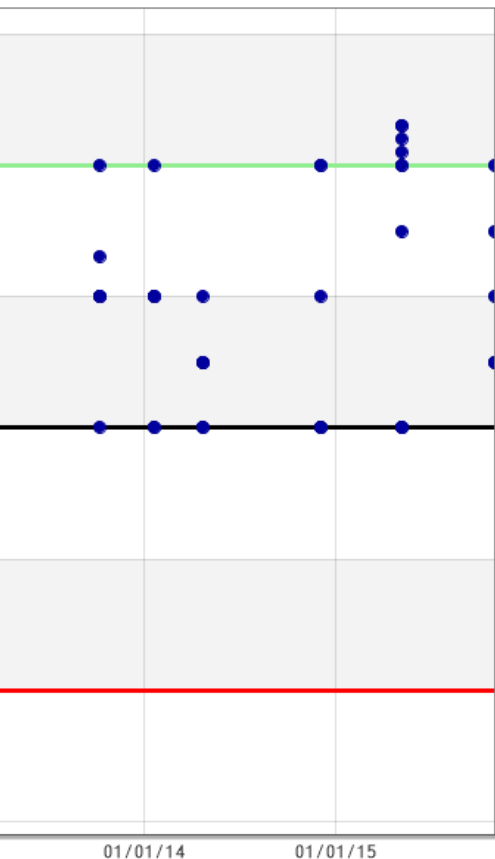


- Same Client, But Various Complaints
 - Not met expectations
 - Too expensive
 - Schedule
 - Poor accuracy

Initial Growth

- **Sometimes you have to work at it!**
 - An ongoing project in the last example took over 2 years to get to where we wanted
 - We needed to change how we communicated our progress
 - But the Client also needed to change their expectations – we had to educate them





Initial Growth

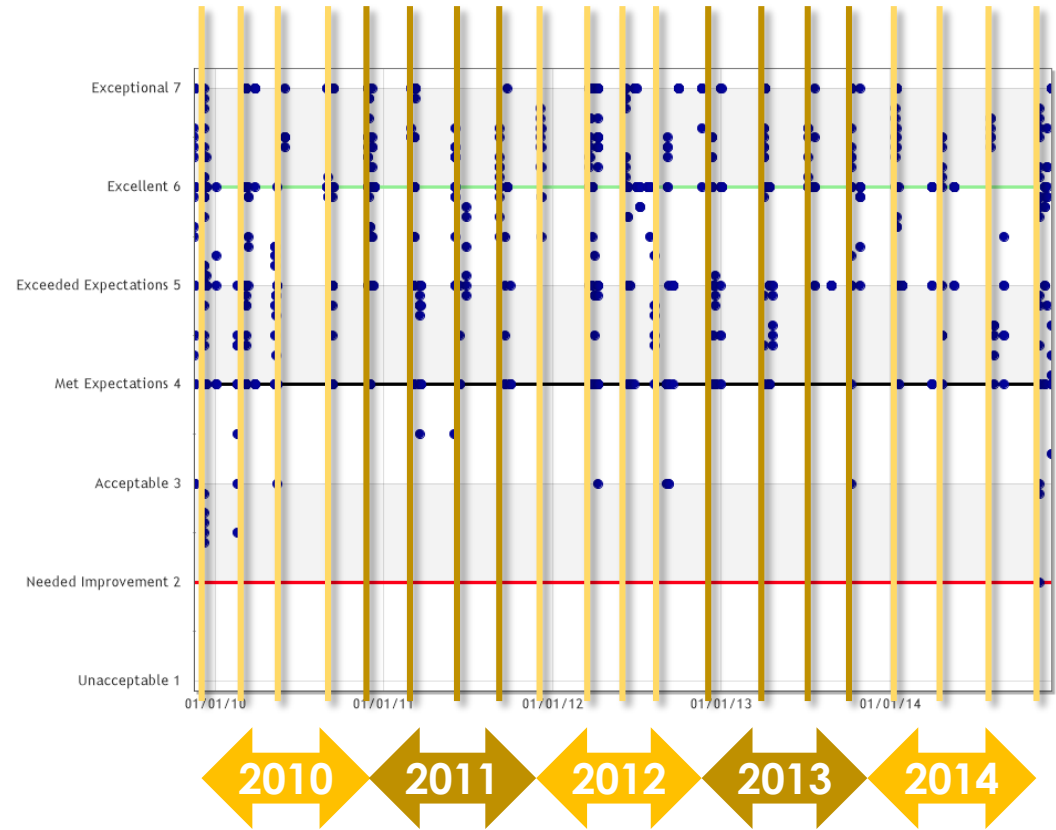
- **Making the tool 'exclusive' gets buy-in and engagement**
 - Junior project managers started with their feedback managed for them
 - When they got access, it was a rite of passage that showed they were trusted and had reached a milestone
 - This created demand to learn and use the tool



Adolescence

As is often the case, this was the tricky bit!!

- We kept on top of sending surveys, but this was achieved by sending quarterly reminders to project managers
- This drove a series of feedback 'pulses'



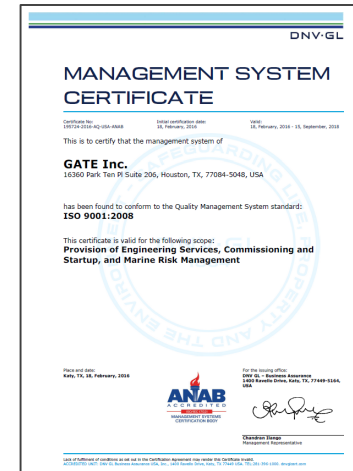
- **This wasn't our only problem**
 - We had grown significantly
 - Our original \$6M revenue business in 2010 was at \$83M by 2015
 - That also bought in a wealth of new faces that we couldn't train and mentor fast-enough



Adolescence & The Illusion of Progress

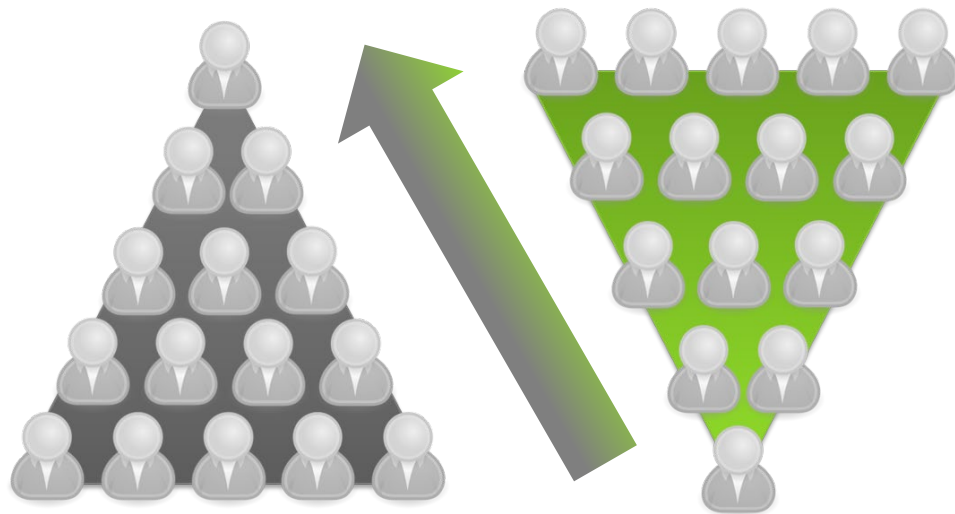
Adolescence & The Illusion of Progress

- The medium started to become more important than the message
 - Exacerbated by ISO 9001
 - Emphasized the compliance aspects of the program
 - Send surveys
 - Get high scores
 - Use corrective actions to document and deal with low scores



Growing Towards Maturity

- In 2015 we realized that we needed to take control of our culture



Typical Leadership Culture
Traditional leadership generally involves the accumulation and exercise of power by one at the “top of the pyramid”

Servant Leadership Culture
Servant-leader shares power, puts the needs of others first and helps people develop and perform as highly as possible

Helped Us Identify Our Values



We Changed
Our
Communication
Strategy...



From Compliance

**MAKE IT
WORK RIGHT
THE FIRST TIME.**

To Empowerment



ASK YOURSELF:

AM I

MAKING IT WORK RIGHT

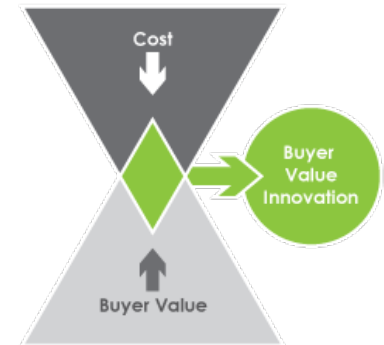
THE FIRST TIME?

ONE TEAM. ONE GOAL.



... & Placed
A New
Emphasis on
Delivery

Transforming Clients Into Raving Fans



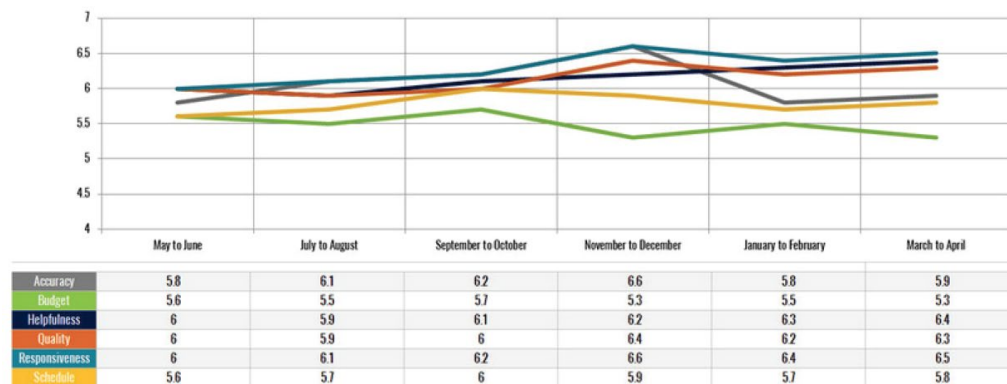
GATE INK

March to April 2017

March to April 2017

Client Feedback

In the last 6 months, GATE has received 12 feedback surveys, where no individual survey response fell below met expectations. 87% of all of the individual scores received in the last 6 months represent ratings of 'Exceeded Expectations' or above, with 41% falling in the maximum rating category of 'Exceptional'.



FLINT HILLS WEST CRUDE/TIER III CONVERSION PROJECT

“

Nichol (Gomez) is very detail oriented. She made sure to track all outstanding items to completion, even when it was not clear what exactly needed to be done.

“

Nichol was very thorough and met all our needs exceptionally well.

“

We met all the target dates and were ahead of others in some cases.

This
Included
How We
Reported
Feedback

Growing from Adolescence

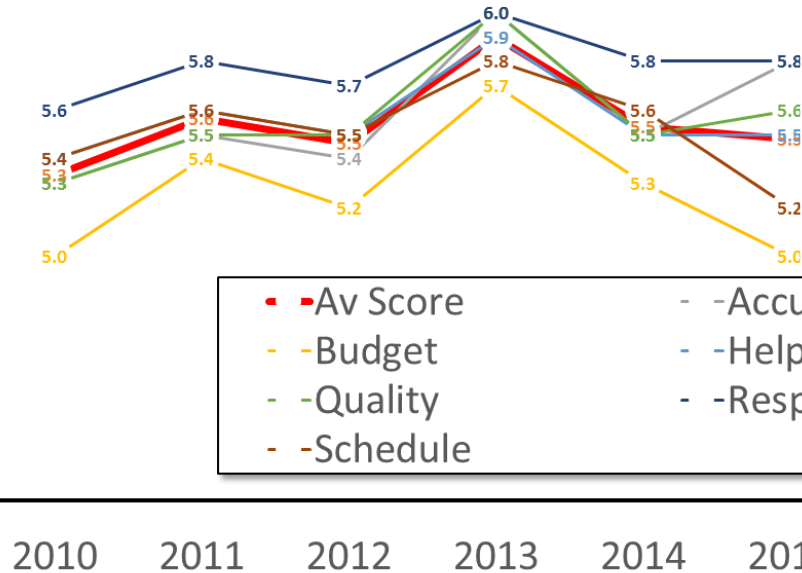
- Was I able to stop reminding people that it was time to send quarterly surveys?

.....**NO**.....

- But something much more profound occurred.....

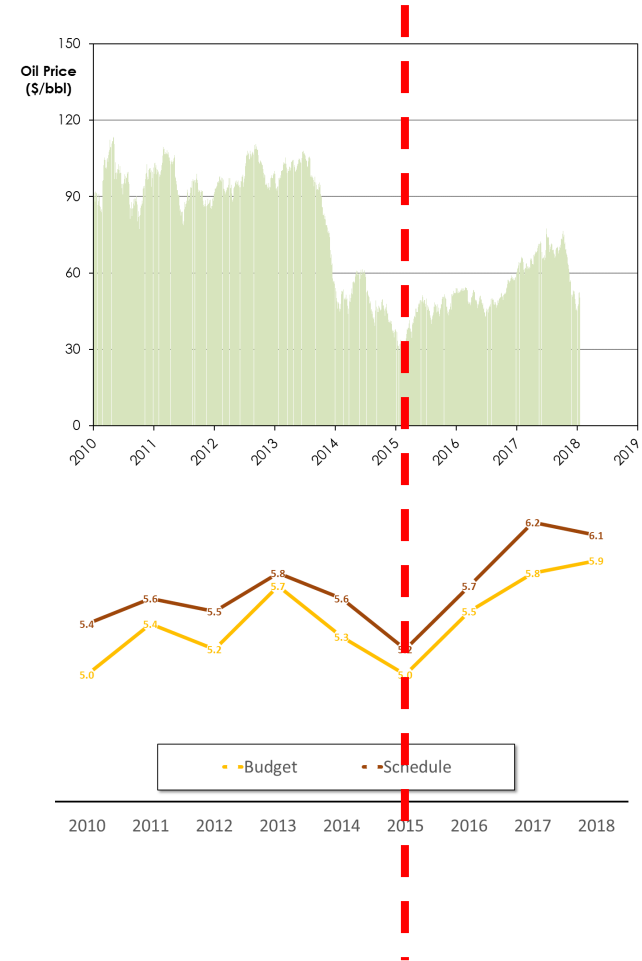
Coming of Age

Reaching Maturity



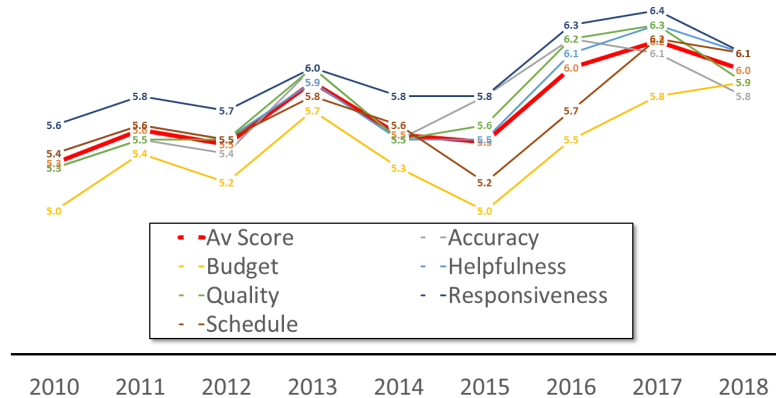
Some Context.....

- **From 2014 to 2017, the oil and gas industry endured its greatest downturn in the last 30 years**
 - We were caught in that whirlwind
 - This was not a period where life was easy, either for us or for our Clients
- **Our feedback data picked up the increased emphasis on cost and schedule in 2015**
 - But these scores rebounded strongly into 2016 and 2017, even as our Clients were still cancelling projects, cutting rates, laying off staff and focusing on capital discipline



That is The Story of GATE

- But it's not the whole story.....



- Now that we were a fully-functioning member of society, we had an urge to meet people and grow our family!



Trials & Tribulations

- Through 2015 to 2017 we made three acquisitions:



High-end design, failure analysis
and expert witness work

Field services, often as a sub
to a prime contractor

General engineering
and staffing services



Trials & Tribulations

- **Through 2017 and 2018, we added them to the Client Feedback Program**
 - Each Affiliate retained responsibility for its operation and for program delivery
 - My job was to provide tools, training and mentoring, not to run their programs

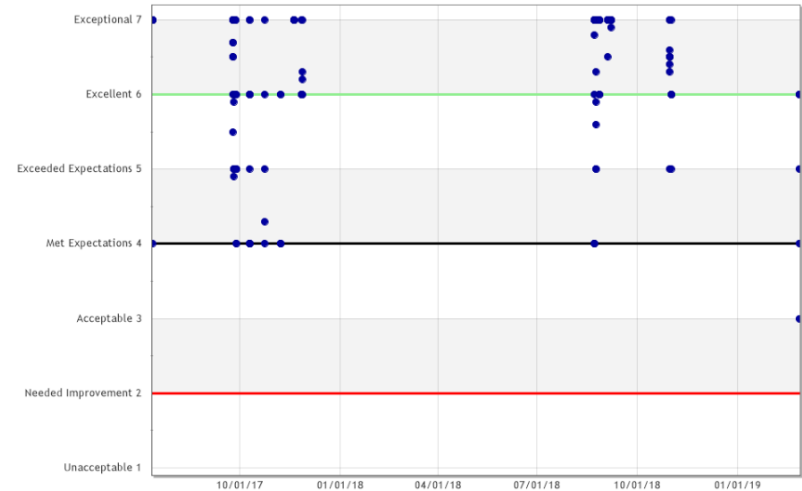


High Hopes with the First-Born

- **President is a long-term GATE employee**
 - Served as the program focal point
- **Clients in this space are not used to this method of feedback and haven't responded to it**
 - Responses are generally very good when they are received
 - But response rate is only 26%

- **Purchased in 2015**

- Added to Client Feedback Program in 2017
- Expected this to be easy

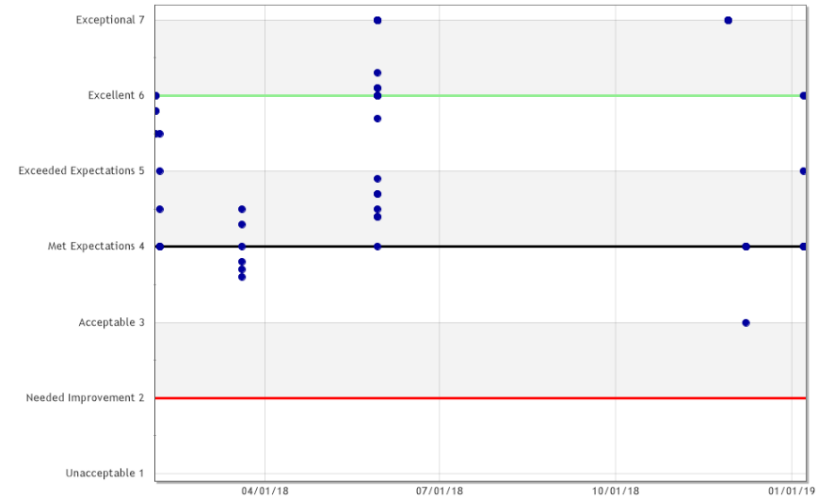


The Problem Child



- **Expected some challenges, but things started really strongly**
 - A champion volunteered to lead the program
 - When he left the business, no clear successor picked it up
- **This later had a major impact**

- **Purchased in late 2017**
 - Added to Client Feedback Program in 2018
 - Were still working to align cultures, so expected some challenges



The Problem Child



- **Only one survey was ever received from their main Client**

- Sent in March 2018
- No evidence of any follow-up beyond 'talked with the guy and he's fine'

- **The Client awarded the work to another contractor in January 2019**

- 24 of 25 staff stayed on with the new Company
- Cut headcount by 30% and revenues by 20%, overnight

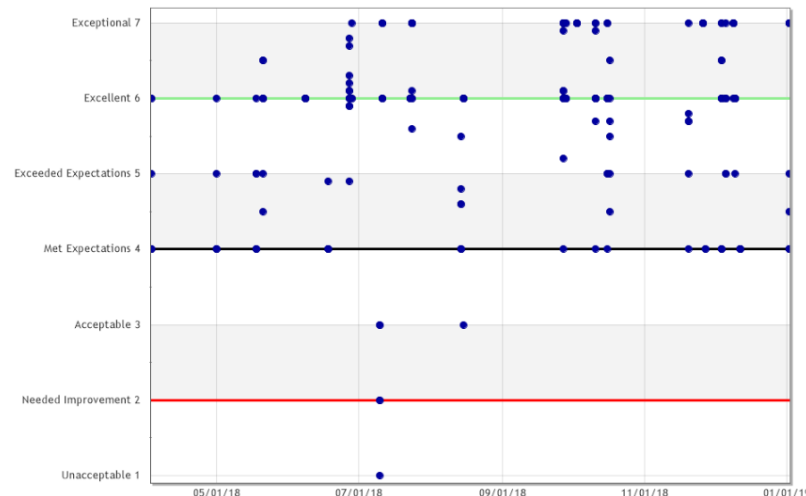
1. How effectively have we conveyed information in a timely and effective manner?		
Tag reply		
Improvement is being noticed in the quality/quantity of communication. Still lacking at morning meeting & 3pm updates. Keep working on it.	Helpfulness	3.7
2. How well have we responded to your questions and concerns?		
Tag reply		
Yes.	Responsiveness	4.0
3. How well has the quality of our work met or surpassed your expectations?		
Tag reply		
Crafts work, yes.	Quality	4.3
4. How well have we provided accurate information that was appropriate for your needs?		
Tag reply		
Schedule updates & planning updates, improved.	Accuracy	3.8
5. How well have we assisted you in meeting your project schedules and milestones?		
Tag reply		
Improving, but still has a ways to go.	Schedule	3.6
6. How effectively have we maintained the proper balance of quality, timeliness and cost?		
Tag reply		
Has come to table with cost saving ideas. Need more centered around efficiency of use of resources.	Budget	4.5

The One You Don't Have Much Hope For!

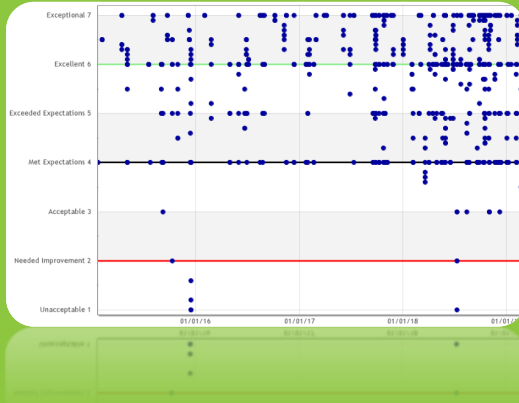


- **Has a really strong 'people' culture, but we weren't sure about delivery**
 - Also expected Clients to be less responsive in their contractor-led market
- **Have seen great traction and great feedback – their Clients love the tool**
 - Several managers became champions for the program
 - Teams have pro-actively addressed all low scores and used high scores to develop deeper relationships

- **Purchased in 2016**
 - Added to Client Feedback Program in 2018
 - Expected this to be really hard



So What Have We (Re) Learned?



1. You need Champions to drive the program

- They will take it further than you can alone
- Enthusiasm is catching!

2. You need people that understand the 'why' of the program

- Compliance-based programs gather data
- Values-based programs get results

3. Sometimes your Clients will surprise you

- Preconceptions are not reliable indicators of actual performance

So What Have We (Re) Learned?



Bright Light: \$525
Sky High: \$675
Dream Adventures: \$50

4. Don't be afraid to try new things!



**BRIGHT LIGHT
FOUNDATION**



DREAM
Adventures

GATE Energy | Fit-For-Purpose Engineering & Services
4,081 followers
8mo

Since 2009 we have been routinely requesting feedback on multiple aspects of our performance using our Client Feedback Tool. This has served to help us better focus on the needs of our Clients and helped us progress to be a premier provider of services and solutions to the energy industry.

However, in a world where workloads are high, time is short and in-boxes are cluttered, we typically only see a 30 to 40% response rate on our feedback requests. We place a huge emphasis on the feedback we receive and so worry that this may leave stones unturned in our quest to deliver a faultless Client experience. As a result, we have decided to offer an extra motivation for our respondents to allocate a few minutes to get their surveys completed.

From July 4 any completed feedback survey returned to the GATE Energy group of companies will see us make a \$25 donation to either Sky High (for BlueFin surveys), the Bright Light Foundation (for GATE and Viking surveys) or Dream Adventures (for PDI surveys).

<https://gate.energy/>

CLIENT FEEDBACK FOR A CAUSE



Submit a Client
Feedback Survey
to GATE, Viking,
BlueFin or PDI.

GATE Energy will make a
\$25 donation to either
Sky High, the Bright Light
Foundation or Dream
Adventures.

So What Have We (Re) Learned?



5. Drive Healthy Competition by Publishing Results

Affiliate	Client Feedback			Net Promoter Score	
	Surveys Sent (Number)	Responses Received (Number)	Met or Exceeded Expectations (%)	Average Score (1 low, 10 High)	Responses Received (Number)
GATE PM&E	14	9	94.6	8.0	2
GATE Commissioning	10	2	100	NA	0
BlueFin	65	27	96.3	9.8	16
PDI	16	2	92.8	10.0	2
Viking	34	10	100	10.0	10
Corporate Total/Average	139	50	96.7	9.8	30

Notes:

1. Values current 1/4/19 for last 180 days



Accuracy



Budget



Helpfulness



Quality



Responsiveness



Schedule

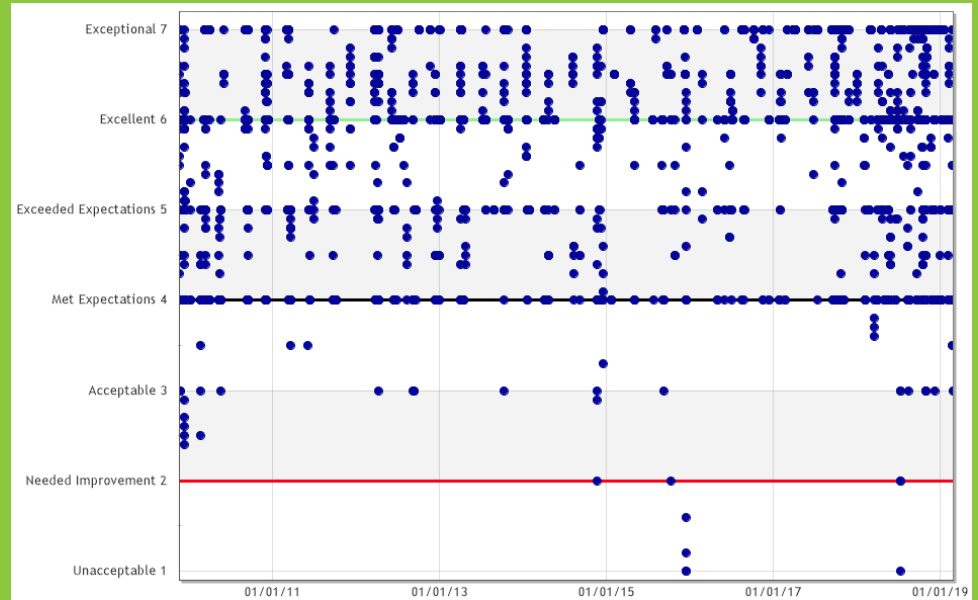
Changing of the Guard



- **I have been the custodian of the Client Feedback Program for 10 years**
 - It is now time to hand over the torch
 - This workshop is the final stage of the handover process
- **We still have work to do**
 - We have a new generation of talent, ideas and energy to take the plan forward
 - They will give it a whole new momentum

Looking Back on The Client Feedback Cycle

- For GATE, it has been the story of a change of approach
 - From building to learning
 - From compliance to empowerment
- Yet 10 years later, we still have areas to improve and things to learn
- We also know that many programs fall to the wayside after 2 to 3 years when people change or energy falters
 - You need more than one champion – we recently had to relearn that lesson



Some Final Thoughts



1. Keep the feedback program relevant, keep it fresh, and keep it evolving

2. Align your message with your culture

3. Identify your staff with a passion for client feedback and have them lead the process

4. Make the ability to send client feedback a badge of honor

5. Don't be afraid to think outside the box and try new things

6. When it comes to the feedback received, publish, publish, publish – both the good and the bad, both internally and externally

7. Don't make process compliance your measure of a successful program

8. Never, ever, ignore poor surveys or declining trends – don't make excuses or assumptions – **COMMUNICATE!**



Thank
You

WE MAKE IT
WORK RIGHT
THE FIRST TIME.

www.gate.energy



GATE
ENERGY



What Did I Miss?
What Are You Curious About?
What Don't You Agree With?

