

SME's CX STORY: PILOT PROJECT TO FULL ENGAGEMENT



THE BEGINNING

Years ago we requested feedback the old way.

Soil and Materials Engineers, Inc. is committed to provide excellent service to its clients. Please rank our level of service by filling out this card. Your comments are greatly appreciated.


Project Name _____ SME Project No. _____

	Excellent	Good	Fair	Poor
How well did we meet your schedule?				
How helpful, courteous, and professional was our staff?				
How useful were our recommendations and technical advice?				
How do you rate the value of our services?				

Would you use SME again? ☐ yes ☐ no Would you like information regarding other SME services? ☐ yes ☐ no

How can we improve our service?

Company Name _____

Your Name (optional) _____ www.sme-usa.com 

THE BEGINNING

- Electronic project reports became our Amazon
- Awareness of a lack of feedback
- Hunt for an electronic feedback approach

THE HUNT

- Direct feedback like the old postcard days
- Make our client lives easier
- Data
- Make our team happier
- Improve our profits

SME CLIENT SAVVY MEETING - MAY 2017

- Daylong meeting
- Benefits of CFT and how it could help our clients
- Philosophy of client excellence/experience (CX)
- Understanding that we do not know everything in our client's heads
- Began to energize small team of future champions
- Shared what type of data we could generate and how it related to profit

CFT TEAM

CX Leader/Marketing/Sales/Regional Vice President:

- Daniel Roeser, PG

Chief Marketing Officer/Senior Vice President:

- Robert Rabeler, PE

Director of Group Operations/Vice President:

- Chuck Gemayel, PE

Administrative Services Managers:

- Rhonda Shelton (Group)
- Kim Looman (Region)

CFT TEAM

- Developed goals
- Selected pilot team
- Coordinated the effort
- Measured results
- Monthly huddles
- Quarterly dives

CLIENT FEEDBACK PILOT PROGRAM GOALS

- Discover what our clients are thinking and saying about our services, focusing on end of the project information.
- Learn how our clients would respond to providing feedback using electronic media.
- Learn how our project managers would respond to sending out feedback requests.
- Improve our service based on client feedback.

CLIENT FEEDBACK PILOT PROGRAM GOALS

- Discover best practices.
- Evaluate benefits and results of the CFT.
- Ensure that we could integrate the CFT with our financial and client software platform (Deltek Vision).
- Confirm that the CFT was user-friendly for our internal users.

CFT PILOT TEAM

- Two of six technical service groups
- Three of 12 offices
- One group leader
- 12 project managers
- Three administrative team members
- Focused on
 - Top clients we could grow
 - New regions

CFT INTEGRATION ISSUES

- Coordination between administrative team and project managers
- Project manager engagement
- Communications between electronic platforms – data transition
- Aligning understanding of client and project types
- Achieving a user-friendly program

SME'S SECRET SAUCE

- Senior leadership (CEO, COO, CMO, and Champions):
Needs to communicate why and value
- Pilot effort: Team of champions
- Clarity of roles and ONE|SME
- Discussed at corporate level operations, BD, and strategic planning meetings
- Integration with Deltek Vision

SME'S SECRET SAUCE

- Administrative team sits in on smaller team Monday operations meetings.
- Queue for future send dates using Deltek Vision: Tuesday and Wednesday send dates yield the best response rate
- Kim and Rhonda
- Use advanced reporting tool for marketing material down to the project management level

SME'S SECRET SAUCE

- Follow-up to client responses: keep it easy for project managers
- Assistant project managers respond for busy project managers
- Easy to follow responding flow diagram
- Groups set up their own sending rules
- Our performance principles

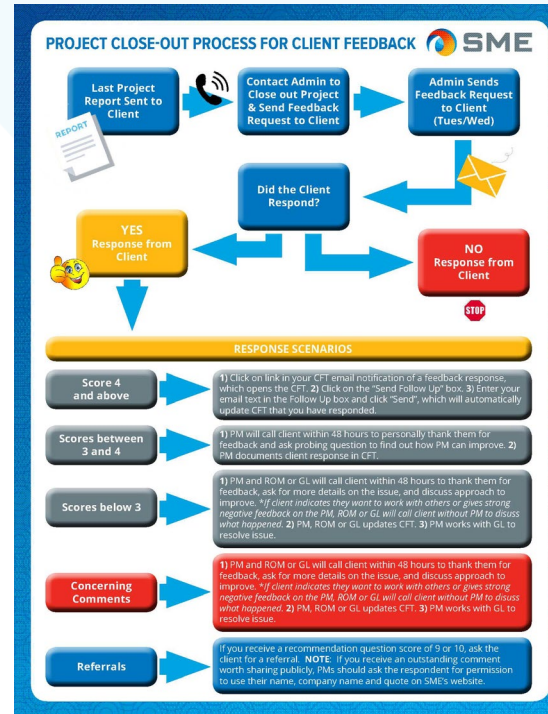
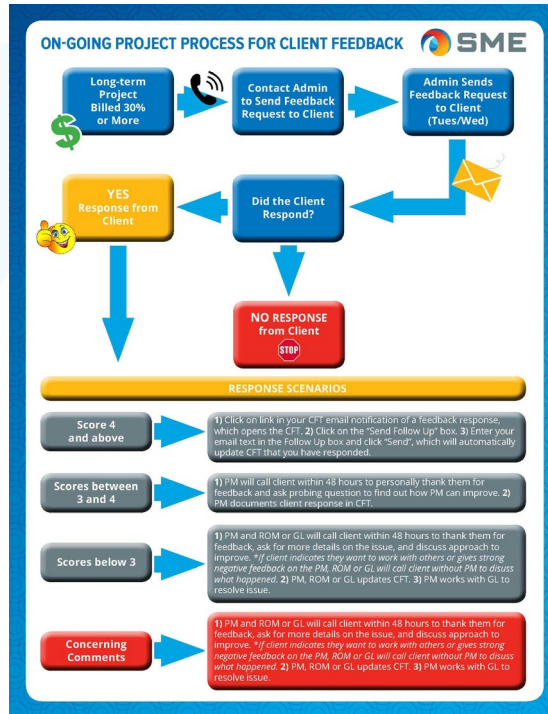
EASY BUTTON-PROJECT MANAGERS/ADMIN

Workshops

- Discuss value and why
- Bring laptops and login to CFT – DO NOT LOG OUT
- Walk through program – sent a request for feedback
- Guidance document
- “How to respond” process diagram

SME'S SECRET SAUCE

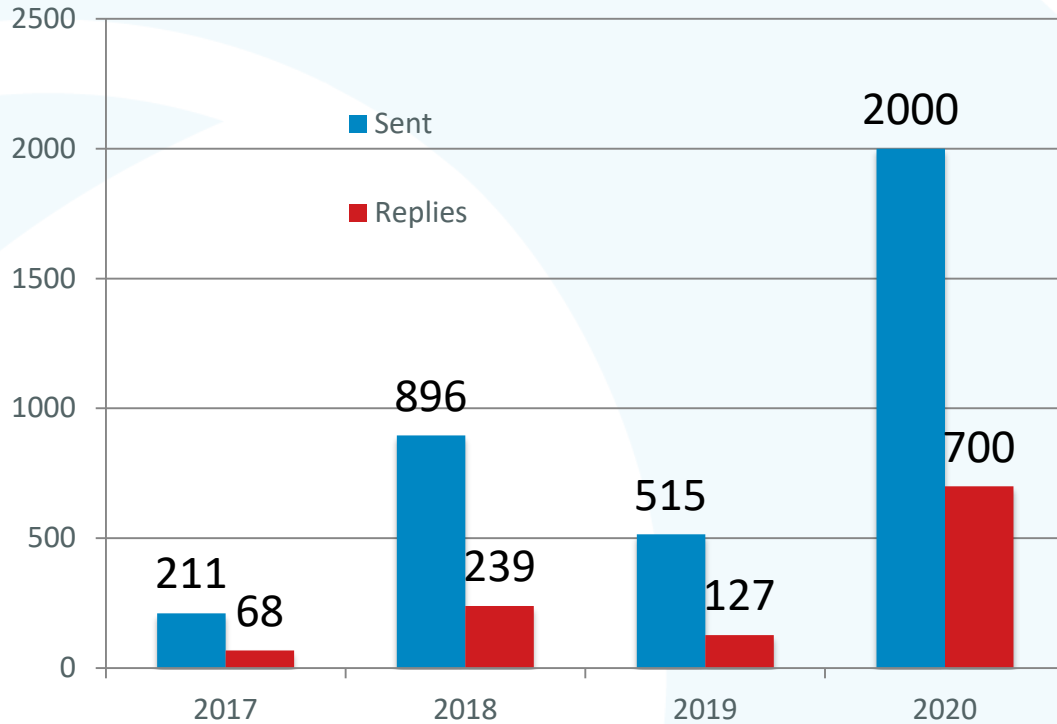
- Easy to follow responding flow diagrams



THE BAIT

- Champions from the pilot team
- Sharing real world experiences at our All-Hands event
- Strong buy in and support from our group leaders
- Sharing data: engineers love data and pie charts
- Recognition for effort
- Some clients will tell you their thoughts on a feedback request that they will not tell you directly.

SME SURVEYS/FEEDBACK DATA



IMPROVE CLIENT EXPERIENCE/SERVICE GOALS - 2019

SME will work with groups and regions so all teams can catch up to the pilot team. Make sure everyone understands why our client's experience is so important and how feedback is a critical part. Utilize best practices to help our teams improve their client experience culture.

IMPROVE CLIENT EXPERIENCE/SERVICE GOALS - 2019

SME will improve our client experience and measure our success using related metrics like NPS score, percentage of responses above acceptable, # of surveys sent, # of responses, response times.

IMPROVE CLIENT EXPERIENCE/SERVICE GOALS - 2019

- 1500 surveys sent and over 500 replies
- NPS above 75
- **Phone call response within 48-hours to all feedback with scores below 3**, document follow-up on 100% of responses
- Improve our process of onboarding a new client to enhance their experience and ours
- Seek referrals from 50 promoters
- Operational teams will develop and implement solutions to service issues that we need to improve based on feedback
- Help define what the Client Experience Journey/Process should look like. Map the process

SME CLIENT EXPERIENCE Q2 ROCKS

Work with new admin team members to improve send rates for SCN, Pavements, and Environmental



One video of project manager testimonials on how CFT feedback has improved our clients experience

SURPRISE BENEFITS

- Best performing groups and project managers have happier clients and higher profitability.
- Some high scoring project managers were giving it away so we shared the data and increased our fees
- Data to show team what we need to improve
- Great material for marketing: comments and pie charts
- Motivating and encouraging feedback to share with project manager and teams. Try to do weekly.

BREAK OUT SESSION 1

- What can we use from this session at our company to invigorate our CFT efforts?
 - 15 Minute Small Group
 - 15 Minutes Group Sharing

BREAK OUT SESSION 2

- What are your best practices to obtain feedback that will benefit others. CFT or otherwise
 - 15 minutes small group
 - 15 minutes group sharing

WRAP UP

30 Minutes on Best Practices/Lessons Learned

WRAP UP

Please give us your
feedback.

The more you give,
the more points you
will receive!

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

