



# Maximize Value in M&A

MANAGE THE CLIENT AND EMPLOYEE EXPERIENCE TO CAPTURE VALUE



## Purpose and Learning Objectives

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**Define Client Experience and Employee Experience**

**Apply the Tools of CX and EX to Create and Capture Value**

**Avoid Common Value Leaks When Buying or Selling a Firm**

*CX or “Client Experience” is the  
**emotional reaction clients have**  
to any interaction with your brand*



# Create and Capture Value

Create  
Future  
Value

Capture  
Future  
Value

Keep Me  
& Family  
Safe

Keep It  
Easy &  
Good

Create  
Oppor-  
tunity

Seller

Buyer

Employee

Client

Partners

# Stakeholder Goals



# The Buyer of a \$10M Firm Loses \$5M in Value



# What Failure Looks Like: Seller's View

**Undervalued  
equity**

**Loss of legacy**

**It's not fun  
anymore**

**Loss of  
performance  
payout**

# What Failure Looks Like: Buyer's View

## Overpaying

(Zweig, Inc.,  
Business Insider)

## Execution

(Inc., Investopedia)

## Capacity vs. Bandwidth

(Investopedia)

## Poor Strategic Fit

(Business Insider)

## Culture

(Zweig, PSMJ,  
Everyone)

## Poor Focus on Human Capital

(GrowthPlay)

## Inadequate Communication

(Business Insider)

## Inadequate Due Diligence

(Zweig, PSMJ)

## Failure to Assess Client Satisfaction

(PSMJ)





# The Root Cause of Failure

HBR #1 Reason: Not helping clients (and employees) complete the journey

*We don't  
**understand or design**  
the critical journeys for our stakeholders*

# So why change?

First, an anecdote







# The scary reality

*Wall Street Journal*

**Customer churn is the top cause  
for half of failures**

*Gallup*

**Customer churn increases 60%  
after an acquisition**

*McKinsey*

**5% of customers churn after  
acquisition (CLV lost)**





# The scary reality

## Client Lifetime Value

- ❑ Total value of a client over time, adjusted to net present dollars
- ❑  $\text{Revenue} \times \text{Margin} \times \text{Churn} \times \text{Discount Rate}$
- ❑ Estimate: 5X - 7X Annual Profit



# The scary reality

*Harvard Business Review*

**Key staff turnover spikes 300%**

*Harvard Business Review*

**Turnover of acquired employees is  
200% higher for NINE YEARS**

*Google search*

**“employee turnover after  
acquisition”  
40.5 million results**





# The scary reality

## Cost of Attrition

- ❑ Key staff cost \$100k to replace (PSMJ)
- ❑ Key relationships walk  
(One principal managing \$2.5M client @ 15% profit = \$2.6MM lost CLV)



*Lost staff and clients don't  
vanish.*

***They go to your  
competitors!***

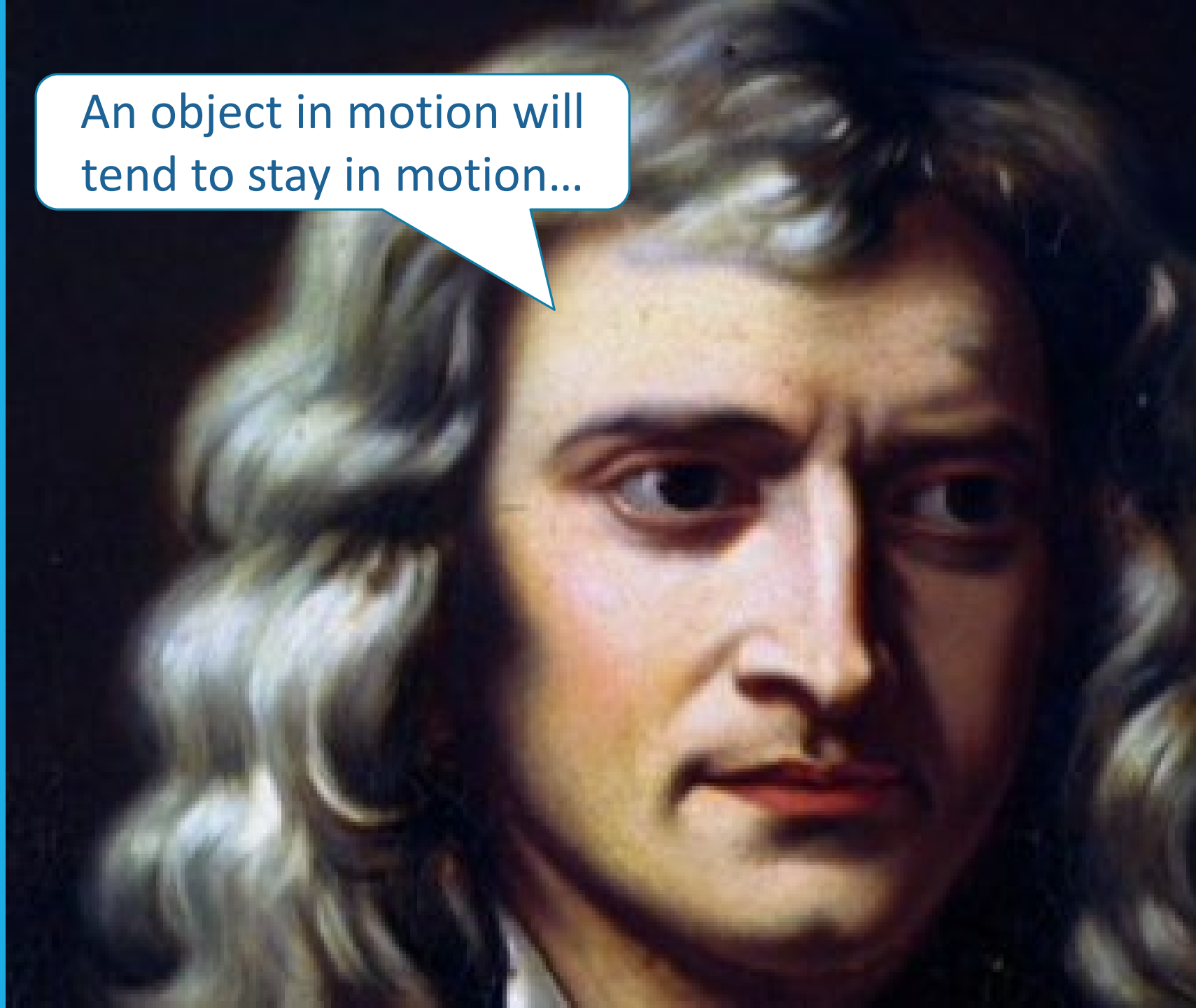


*On the up side...*

*With both clients and staff leaving  
utilization rates should still be okay*

Why does this  
happen?

An object in motion will  
tend to stay in motion...





The old path forward no longer exists.

Clients and employees are confronted with a choice they must now make

# Inertial Drivers

**Lack of  
Engagement**

**Lack of  
Preparedness**

**Introduction  
of New Effort**

**You Weren't  
My First  
Choice**



# Emotional Drivers

**Uncertainty**

**Fear**

**Unearned  
Trust**

**Perceived  
Effort of  
Change**

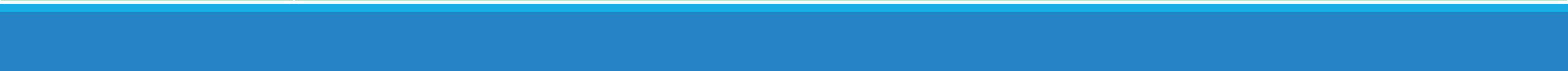
***Well, now what?***

# Value Capture Planning

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MAPPING THE JOURNEY FOR ALL STAKEHOLDERS

	Mindset and Emotional Map
Seller	Hope, Reward, Short-Term Anxiety
Buyer	Optimism, Risk Management, Long-Term Reward, Easier Future than Present
Employee	Uncertainty, Loss of Family, Loss of Agency, Opportunity, Loss of Position
Client	Frustration at Change, Practical Concerns (Schedule, Budget), Uncertainty, Became a Smaller Fish in a Bigger Pond, “That’s Not Who I Hired”
Partner	Fear The Well Runs Dry, Excited to Add a Bigger Logo to Portfolio, Worry About Business Arrangements / Payment





	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller						
Buyer						
Employee						
Client						
Partner						

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	Consistency	Succession Execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan	Nail the Basics	Learn Before You Change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan	Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communications	Reveal “The Same” but Better	Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins	Keep Payments Flowing	Meet and ID Strengths & Opportunities	Deliver More & Share Savings

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Planning	Design CX & EX	Consistency	Succession Execution	Go Fishing
Buyer	Look for Winners	Design CX & EX	Measure CX & EX	Fail the Basics	Learn Before You Change	Unify CX
Employee	Engage and Deliver CX	Build CX & EX	Design CX & EX	Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX
Client	Continuous Project Feedback	Build CX & EX	Design EX Measure EX	Deal "The Same" but Better	Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Build CX & EX	Design CX & EX	Keep Payments Flowing	Meet and ID Strengths & Opportunities	Deliver More & Share Savings

Create a Plan for Value Creation

- ☐ Design CX
- ☐ Measure CX
- ☐ Design EX
- ☐ Measure EX

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession	Consistency	Succession Execution	Go Fishing	
Buyer	Look for Winners	Consistency	Learn Before You Change	Unify CX		
Employee	Engage and Deliver CX	Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX		
Client	Continuous Project Feedback	Benchmark CX	Continuous Project Feedback & Expand			
Partner	Win / Win Partnership	Meet and ID Strengths & Opportunities	Deliver More & Share Savings			

Look For CX & EX Winners

- ☐ CX Awards (Client Savvy)
- ☐ Client Satisfaction (PSMJ)
- ☐ Best Place to Work (Zweig, Inc., Etc.)

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	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Planning	Consistency	Succession Execution	Go Fishing	
Buyer	Look for Winners	Engage and Deliver CX	Fail the Basics	Learn Before You Change	Unify CX	
Employee	Engage and Deliver CX	Help Employees Engage	Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX	
Client	Continuous Project Feedback	Enable Peak CX Performance	Deal “The Same” but Better	Benchmark CX	Continuous Project Feedback & Expand	
Partner	Win / Win Partnership	Be	Keep Payments Flowing	Meet and ID Strengths & Opportunities	Deliver More & Share Savings	

Engage and Deliver CX

☐ Help Employees Engage

☐ Enable Peak CX Performance

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession	Consistency	Succession Execution	Go Fishing	
Buyer	Look for Winners	Consistency	Learn Before You Change	Unify CX		
Employee	Engage and Deliver CX	Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX		
Client	Continuous Project Feedback	Benchmark CX	Continuous Project Feedback & Expand			
Partner	Win / Win Partnership	Meet and ID Strengths & Opportunities	Deliver More & Share Savings			

Continuous Project Feedback

- Give Clients a Voice
- Use Data to Measure & Improve Your Value

Continuous Project Feedback

☐ Give Clients a Voice
 ☐ Use Data to Measure & Improve Your Value

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession	Consistency	Succession Execution	Go Fishing	
Buyer	Look for Winners	Consistency	Learn Before You Change	Unify CX		
Employee	Engage and Deliver CX	Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX		
Client	Continuous Project Feedback	Deal “The Same” but Better	Benchmark CX	Continuous Project Feedback & Expand		
Partner	Win / Win Partnership	Keep Payments Flowing	Meet and ID Strengths & Opportunities	Deliver More & Share Savings		

Win / Win Partnership

- ❑ Become the easiest client you can be
- ❑ Ask how you can help partner be the best they can be

Win / Win Partnership

❑

Become the easiest client you can be

❑

Ask how you can help partner be the best they can be

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justify Reason		Succession Execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Before You Change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review		Benchmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Communicate		Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Partner		Identify Strengths & Opportunities	Deliver More & Share Savings

Succession Plan

- ☐ Work with buyer to build a clear plan with clients and employees
- ☐ Use CX design and feedback process in the plan



	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justify Reas		Succession execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Before You change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review		hmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Co Comm		hmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Part.		et and ID strengths & Opportunities	Deliver More & Share Savings

**Gather MORE Metrics**

- ☐ Integrate financial metrics with CX and EX metrics

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justify Reas		Succession execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Before You change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review		hmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Co Comm		hmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Part.		et and ID lengths & Opportunities	Deliver More & Share Savings

Gather MORE Metrics

- ☐ Revenue at risk (low CX scores)
- ☐ 24.7% of clients have a complaint
- ☐ 7% are looking for alternatives now

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justify Reas		Succession execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Before You change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review		hmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Co Comm		hmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Part.		et and ID strengths & Opportunities	Deliver More & Share Savings

Gather MORE Metrics

- ☐ Look for hidden value (28% high CX & low margin)
- ☐ Estimate Share of Wallet to ID growth potential

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justify Reas		Succession execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Before You change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review		hmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Co Comm		hmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Part.		et and ID strengths & Opportunities	Deliver More & Share Savings

Gather MORE Metrics

- ❑ Watch for low EX scores with key relationship managers – that revenue is at risk



	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justify Reas		Succession execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Cr		Before You change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review		hmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Co Comm		hmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Part.		et and ID strengths & Opportunities	Deliver More & Share Savings

Benchmark EX

☐ Ask employees questions about culture and engagement

☐ Track eNPS Score to ID overall flight risk (target 70+ and beware 40-)

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justify Reas	<div> <h3>Benchmark CX</h3> <ul style="list-style-type: none"> <li>❑ Systematic, objective, electronic measure of CX. Target NPS 75+ and beware 40-</li> <li>❑ Assure top 80% of revenue measured</li> </ul> </div>		Succession execution
Buyer	Look for Winners	Gather CX/EX Metrics	Com CX,			Before You change
Employee	Engage and Deliver CX	Benchmark EX	Review			hmark EX
Client	Continuous Project Feedback	Benchmark CX				hmark CX
Partner	Win / Win Partnership	Benchmark CES	ID Part.			et and ID lengths & Opportunities
						Go Fishing
						Unify CX
						Execute on CX
						Continuous Project Feedback & Expand
						Deliver More & Share Savings

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justify Reas	<div>Benchmark CX</div> <ul style="list-style-type: none"> <li>Assure KDMs are measured in top accounts</li> <li>Assess NPS drivers (helpfulness, responsiveness, etc.) to ID strengths / weaknesses</li> </ul>		Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Com CX,			Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review			Execute on CX
Client	Continuous Project Feedback	Benchmark CX				Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Part.			Deliver More & Share Savings

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justify Reas	<div> <div>Benchmark CX</div> <ul style="list-style-type: none"> <li>Identify promoters to target immediate cross-selling opportunities for newly added services (59% on average)</li> </ul> </div>		Succession execution
Buyer	Look for Winners	Gather CX/EX Metrics	Com CX/			Before You change
Employee	Engage and Deliver CX	Benchmark EX	Review			hmark EX
Client	Continuous Project Feedback	Benchmark CX				hmark CX
Partner	Win / Win Partnership	Benchmark CES	ID Part.			et and ID strengths & Opportunities
						Go Fishing
						Unify CX
						Execute on CX
						Continuous Project Feedback & Expand
						Deliver More & Share Savings



	Prepare	Diligence	Announce	Day 1	Short Term	Long Term	
Seller	Create CX & EX	Succession Plan	Justify Reas	<div>Benchmark CES</div> <div><input type="checkbox"/> Customer Effort Score tells you how difficult working with a business will be. Trade partners have the best insight of local competitive landscape</div>		Succession execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Com CX/			Before You change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review			hmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX	C			hmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Part.			et and ID strengths & Opportunities	Deliver More & Share Savings

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	Consistent		Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan	No		/ CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan	Day 1, V Month		on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communications	Reveal “T but B		is Project back and
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins	Keep Pay Flowing		More & Savings

Justified Reassurance

- ☐ Use past feedback to ID brand strengths
- ☐ Reassure clients and staff that the strengths THEY LOVE will remain

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	Consistent		Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan			/ CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan	Day 1, V Month		on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communications	Reveal “T but B		is Project back and
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins	Keep Pay Flowing		More & Savings

Communicate CX/EX Plan

☐ Reduce fear and uncertainty

☐ Reveal the clearly articulate plan to maintain the current good

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	Consistent		Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan	Nail		/ CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan	Day 1, V Month		on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communications	Reveal “T but B		is Project back band
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins	Keep Pay Flowing		More & Savings

### Review CX/EX Plan

- ☐ Confidence in role
- ☐ Clarity in plan



	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	Consistent	Consistent	Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan	Nail the	Consistent	Buyer / CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan	Day 1, V Month	Consistent	on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communications	Consistent	Consistent	is Project back band
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins	Keep Pay Flowing	Consistent	More & Savings

CX Communications

☐ Position all communications from the client’s perspective

☐ Not about you

☐ Plan to continue acknowledged strengths

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	Consistent	Partner "Wins"	Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan	Nail the		/ CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan	Day 1, V Month		on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communications	Reveal		is Project back band
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins	Keep Pay Flowing		More & Savings

**Partner “Wins”**

- ☐ Anticipate how trade partners can “win” in the new order
- ☐ Communicate opportunities
- ☐ Reassure smooth operations

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & Plan	Identify CX	Identified CX	Consistency	Succession Execution	Go Fishing
Buyer	Look for Wins	Identify CX	Identified CX	Nail the Basics	Learn Before You Change	Unify CX
Employee	Engage and Develop CX	Identify CX	Identified CX	Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX
Client	Continuous Feedback	Identify CX	Identified CX	Reveal “The Same” but Better	Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Identify CX	Identified CX	Keep Payments Flowing	Meet and ID Strengths & Opportunities	Deliver More & Share Savings

**Consistency**

☐ Today is the same as yesterday

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & r		ified nce	Consistency	Succession Execution	Go Fishing
Buyer	Look for Win	<div> Nail the Basics <ul style="list-style-type: none"> <li>❑ Do no wrong</li> <li>❑ Nothing changes (yet)</li> </ul> </div>		Nail the Basics	Learn Before You Change	Unify CX
Employee	Engage and D CX			Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX
Client	Continuous F Feedback			Reveal “The Same” but Better	Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership			Keep Payments Flowing	Meet and ID Strengths & Opportunities	Deliver More & Share Savings



	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & r		ified nce	Consistency	Succession Execution	Go Fishing
Buyer	Look for Win			Nail the Basics	Learn Before You Change	Unify CX
Employee	Engage and D CX			Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX
Client	Continuous F Feedback			Reveal “The Same” but Better	Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership			Keep Payments Flowing	Meet and ID Strengths & Opportunities	Deliver More & Share Savings

Share The Milestones

- ☐ Day 1 Plan
- ☐ Week 1 Plan
- ☐ Month 1 Plan

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & r		ified nce	Consistency	Succession Execution	Go Fishing
Buyer	Look for Win		cate an	Nail the Basics	Learn Before You Change	Unify CX
Employee	Engage and D CX		X Plan	Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX
Client	Continuous F Feedback			Reveal “The Same” but Better	Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership		Wins	Keep Payments Flowing	Meet and ID Strengths & Opportunities	Deliver More & Share Savings

**The Same But Better**

- ☐ Communicate!
- ☐ Communicate!
- ☐ Introduce future change, but don't change today

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & r	Identified	Announce	Consistency	Succession Execution	Go Fishing
Buyer	Look for Win	Identified	Announce	Nail the Basics	Learn Before You Change	Unify CX
Employee	Engage and D CX	Identified	Announce	Day 1, Week 1, Month 1 Plan	Benchmark EX	Execute on CX
Client	Continuous F Feedback	Identified	Announce	Reveal “The Same” but Better	Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Identified	Announce	Keep Payments Flowing	Meet and ID Strengths & Opportunities	Deliver More & Share Savings

Keep Payments Flowing

- ☐ This is the top concern
- ☐ Look at other business-in-flight
- ☐ Award a new project (phew!)

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan			Succession Execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Learn Before You Change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX			Benchmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX			Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES			Meet and ID Strengths & Opportunities	Deliver More & Share Savings

**Succession Execution**

- ☐ Flawless execution of the CX / EX plan
- ☐ It's not about you anymore: focus on the emotional drivers of the others

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	<div> <div>Change Management</div> <ul style="list-style-type: none"> <li><input type="checkbox"/> Learn what's working before you change</li> <li><input type="checkbox"/> Keep, Grow, Prune</li> <li><input type="checkbox"/> Drive excitement about making "mother" better too</li> </ul> </div>		Succession Execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Learn Before You Change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX			Benchmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX			Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES			Meet and ID Strengths & Opportunities	Deliver More & Share Savings



	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan			Succession Execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Learn Before You Change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX			Benchmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX			Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES			Meet and ID Strengths & Opportunities	Deliver More & Share Savings

**Benchmark EX**

☐ After shock has waned, repeat the due diligence employee assessment

☐ Look for continued or increasing engagement issues

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	<div> <div>Benchmark CX</div> <ul style="list-style-type: none"> <li>❑ Repeat diligence assessment but looking ahead</li> <li>❑ “Now that you’ve experienced our expanded capabilities...”</li> </ul> </div>		Succession Execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Learn Before You Change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX			Benchmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX			Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES			Meet and ID Strengths & Opportunities	Deliver More & Share Savings

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan			Succession Execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Learn Before You Change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX			Benchmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX			Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES			Meet and ID Strengths & Opportunities	Deliver More & Share Savings

**Benchmark CX**

- ☐ Look for newly at-risk clients and intervene
- ☐ Look for curious cross-shoppers and capture

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	<div> <b>Strengths &amp; Opportunities</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Meet with each substantial partner</li> <li><input type="checkbox"/> Discuss expanded business</li> <li><input type="checkbox"/> Ask for help co-creating client value</li> </ul> </div>		Succession Execution	Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics			Learn Before You Change	Unify CX
Employee	Engage and Deliver CX	Benchmark EX			Benchmark EX	Execute on CX
Client	Continuous Project Feedback	Benchmark CX			Benchmark CX	Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES			Meet and ID Strengths & Opportunities	Deliver More & Share Savings

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	<div>Go Fishing</div> <ul style="list-style-type: none"> <li><input type="checkbox"/> Relax: you captured all the value you created</li> <li><input type="checkbox"/> Relax: your staff are in good hands</li> <li><input type="checkbox"/> Relax: your clients are taken care of</li> </ul>		Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan			Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan			Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communication			Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins			Deliver More & Share Savings



	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	<div> <div>Unify CX</div> <ul style="list-style-type: none"> <li>❑ Integrate the best of both in both orgs</li> <li>❑ Assure buyers have the same experience with new services as with old</li> </ul> </div>		Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan			Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan			Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communication			Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins			Deliver More & Share Savings

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	<div>Execute CX</div> <ul style="list-style-type: none"> <li>Engage employees in the CX plan</li> <li>Drive accountability via CX measurement</li> </ul>		Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan			Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan			Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communication			Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins			Deliver More & Share Savings

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	<div>Continuous Feedback<ul style="list-style-type: none"><li><input type="checkbox"/> Continue the plan of ongoing regular feedback</li><li><input type="checkbox"/> Cross-sell when earned</li><li><input type="checkbox"/> Mitigate risk when observed</li></ul></div>		Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan			Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan			Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communication			Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins			Deliver More & Share Savings

	Prepare	Diligence	Announce	Day 1	Short Term	Long Term
Seller	Create CX & EX	Succession Plan	Justified Reassurance	<div>Share Savings<ul style="list-style-type: none"><li><input type="checkbox"/> Measure &amp; reduce effort to serve</li><li><input type="checkbox"/> Use your scale to buy more from partners</li><li><input type="checkbox"/> Share in effort &amp; work-capture savings</li></ul></div>		Go Fishing
Buyer	Look for Winners	Gather CX/EX Metrics	Communicate CX/EX Plan			Unify CX
Employee	Engage and Deliver CX	Benchmark EX	Review CX/EX Plan			Execute on CX
Client	Continuous Project Feedback	Benchmark CX	Consume Communication			Continuous Project Feedback & Expand
Partner	Win / Win Partnership	Benchmark CES	ID Partner Wins			Deliver More & Share Savings

# Measuring Success

**Track  
Turnover**

**Track Client  
Churn**

**Measure CX  
add 3%  
(PSMJ)**

**Benchmark (23  
CX leaders  
gained 39 ENR  
spots)**



# Measuring Success

A sample case study

**\$20M/year Net Service Revenue**

**with 150 employees**

**\$10M valuation under “standard” methods**

(Deltek: 45% - 60% NSR / \$60k-\$70k per FTE)

Average turnover: 14% (Zweig)

Turnover cost: \$100k/per key departure (PSMJ)

Average revenue retention: 83% (ENR)

Average profit margin: 13% (PSMJ)

Post Acquisition:

300% increase in turnover (HBR) / 60% increase in churn (Gallup)

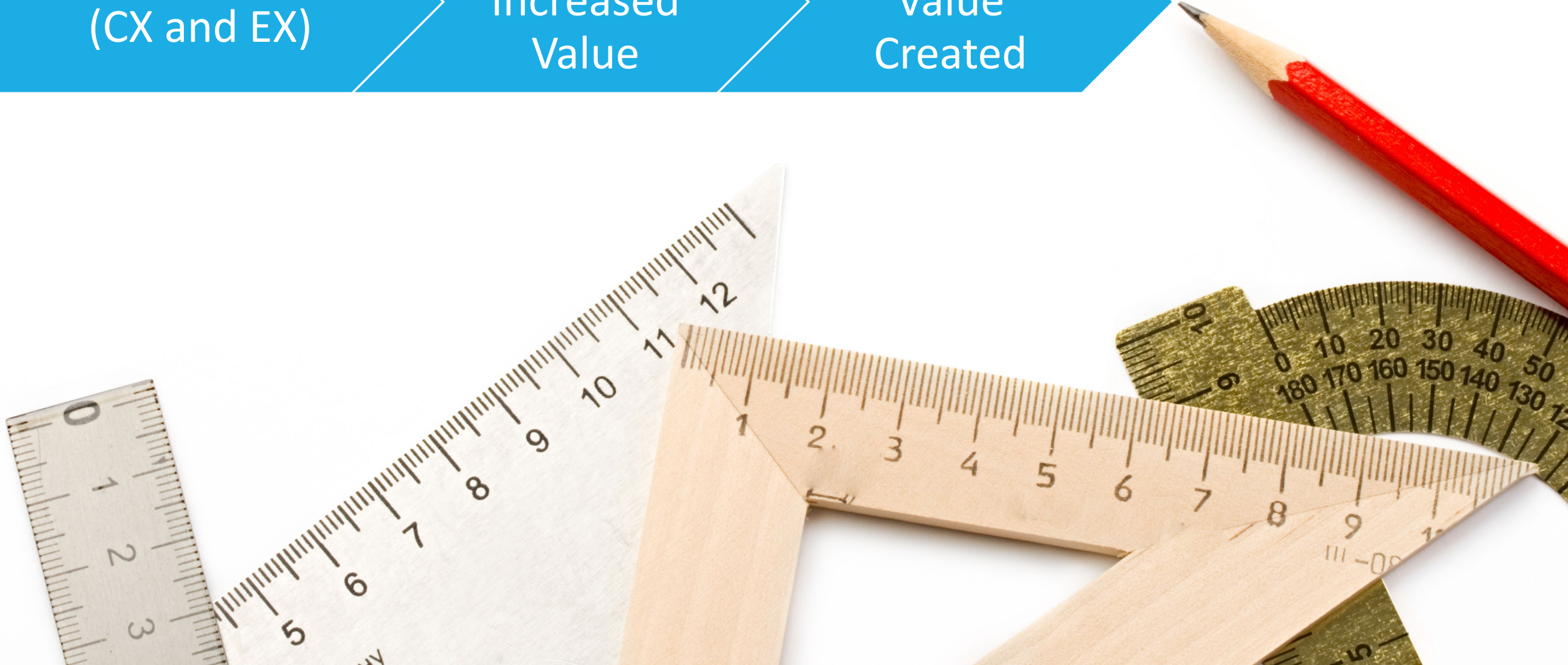
**\$4.2M turnover cost / \$1.3M in CLV lost**

**Five Million Dollars in Lost Value**

Measure the Value  
(CX and EX)

Design for  
Increased  
Value

Capture the  
Value  
Created



# Questions?

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REQUEST SLIDES OR ONE-PAGE GUIDE:  
[ANSWERS@CLIENTSAVVY.COM](mailto:ANSWERS@CLIENTSAVVY.COM)