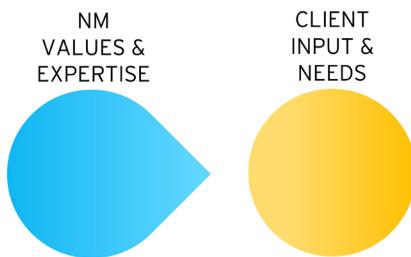




## WHY DID YOU CHOOSE TO CONSIDER (AND/OR IMPLEMENT) THE CX INITIATIVE CHOSEN?

In many cases, client experience initiatives are initiated due to an overwhelming need, a crisis at hand, or a crucible moment. At Neumann Monson Architects, we are fortunate in that we have no crisis to overt and no declining client experiences. For forty years our financial history has been stable, we have consistently hit our profit goals, and we have never laid off an employee due to a lack of work. We are a successful and award-winning firm.

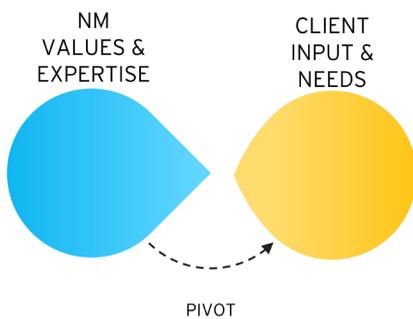
Yet in 2017 Neumann Monson Architects established client experience as the number one Critical Objective in our three-year Strategic Plan. Many factors converged to make the decision. The path of getting to that point took five years of an inward-focused discovery: a grass roots effort that dove deep and questioned our meaning and purpose.



## NM INSIDE-OUT

Established in 1977 with a team of just four employees, by 2012 Neumann Monson had steadily grown to a firm of 35 in two locations. In addition to the number of employees, this growth was also marked by our advancing innovation and drive for design excellence. But the team was growing dissatisfied and frustrated. The centralized, non-transparent leadership that had successfully led us through our first 35 years was no longer adequate or appropriate. There was a divide between leadership and the rest of the team. Internal silos had developed and were operating at different levels of performance, with different expectations, and different values. Trust was lacking, and communication was poor. Our mission, strategy and standards were unclear. In spite of this, our successes were compelling enough that we had assembled a team of highly talented, hard-working people with remarkable skills.

Through a grass roots effort, we began a necessary evolution that focused on internal processes, systems, and tools. Guided by the belief that our internal strengths and capabilities would make the organization prevail and adapt into the future, our goal was to leverage our existing talents and strengths. We sought a clear and unified understanding of our beliefs and purpose, as you must know your own self, before you can influence others. This was an inside-out ideological approach.

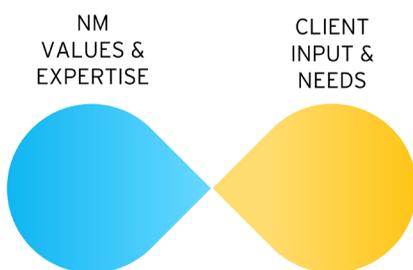


### NM PIVOT

After three years of success with a strong inward focus, a new transformation began to pivot our focus from inward to outward. First, our Principals created a Legacy Statement for the firm. This statement identified seven pillars necessary for us to break through to excellence. One pillar was Service; the need to delight our clients, add value, and elevate their vision.

Second, we implemented Client Feedback Tool to establish our voice of the customer. Through this important tool we began to understand the power of feedback from our clients and internally with each other. We started using the Client Feedback Tool for our internal 360 reviews. We shifted to a culture that not only completed reviews top-down, but also down-up. For the first two years these down-up reviews were completed anonymously. Since then we have completed all reviews (top-down, down-up, and peer-peer) transparently. This non-traditional approach to giving and receiving feedback across the company opened our minds to the immense power of feedback.

The internal use of CFT also resulted in a mindset shift, or pivot. We learned how to use feedback to improve ourselves and any situation, and build stronger relationships. We grew to appreciate that the real power of feedback belongs to the receiver. This skill had to be perfected internally before we could put it to practice externally and complete the pivot to outside-in.

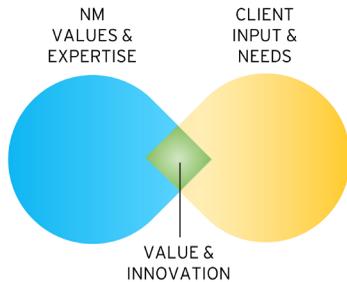


### NM OUTSIDE-IN

Early in 2017 Sally Obernolte attended the CXps Conference. She brought back Client Experience knowledge and started planting seeds within the firm through bi-monthly CFT meetings, article and information posts to the firm's intranet, and internal lunch and learn conversations on the topic. These exchanges were open to all staff and a rich dialog was created. This is a great example of "bottom-up" influence and demonstrates that positive change need not be Principal led. This was another example of grass roots influence at Neumann Monson.

This firm is fortunate to have a Principal Team that exemplifies leadership through open-minded listening. In 2012 a Principal-led effort attempted to push the team toward client service. The team responded by pushing back, with the desire to first define the firm and improve our craft and processes. Leadership listened. Through this methodology, trust, transparency, and transformation were achieved, and a stronger team foundation supporting mutual exchange was created. So, when leadership elevated Client Experience as the number one Critical Objective in the Strategic Plan, the team was primed to complete the pivot to an outside-in approach.

In early 2018 we hired a consulting firm, CX Pilots, to lead us through a client experience strategic plan. Together we have created an aggressive twelve-month plan. It is in full swing and is supported by firm-wide excitement.



**NM BALANCE**

At Neumann Monson we believe the best organizations skillfully employ both inside-out and outside-in approaches. We see this as important because it opens our perspective, makes us more responsive to change, and creates an environment that is more conducive for innovation. We believe the most effective business strategies need to consider both internal practicalities and external shifts. When both approaches are coupled, greater value and innovation are generated. We believe that we are more powerful together than we are separately. Each day we strive for this balance in order to create the greatest impact for the future of all parties involved and ultimately build better partnerships.

This evolution has occurred over the past six years and has created for us and our clients a stronger and more unified purpose. This is reflected in our value-driven mission and our plan to carry it through.

**Our Mission:**

At Neumann Monson Architects we believe in driving positive change. We believe in elevating expectations and elevating the human experience.

We drive change by empowering our people, our customers, and our communities through better partnerships.

These partnerships are the power behind the creation of thoughtful and relevant design solutions.

Together we will create a product and a human experience that serves as a symbol of your beliefs.

The remainder of this submission further details our focus on empowering our people, our customers, and our communities through better partnerships. Designing better partnerships is the embodiment of what differentiates Neumann Monson. We believe we have the rigor, discipline, and integrity to design a client experience that brings value.

**WHAT POSITIVE CLIENT EXPERIENCE OUTCOME IS YOUR FIRM HOPING TO ACHIEVE (HAVE YOU ACHIEVED?)**

We are striving to achieve Better Partnerships. We believe our uniquely designed client partnership experience will be the power, or the engine, that creates results to deliver the most value to our clients, our communities, and to our team.

our why  
 our how  
 our what  
 our promise



We strive for the following partnership outcomes:

- Better partnerships with the Communities which know us best
- Better external partnerships with those who share our values and hire us to do our best work
- Better internal partnerships with each other as employees within the firm and with greater role clarity
- Better partnerships qualitatively which lead to more meaning and intent behind the revenue
- Better individual partnerships between all employees in their specific parts of the overall partnership experience

Our aspirations for partnership experience aligns with several other ranked Critical Objectives (CO) within our Strategic Plan.

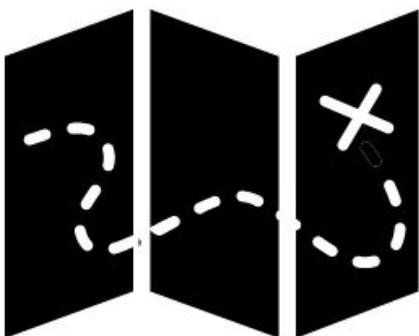
**Directly aligns with:**

- Defining our brand (CO2),
- Establishing an NM approach to effective responsibilities, role clarity, and accountability (CO3),
- Defining our prioritized performance metrics (CO7)
- Retaining and attracting ideal clients with shared values (CO8)

**Indirectly aligns with:**

- Expanding our sphere of influence (CO5)
- Investing in our long-term development and maintaining of a positive profit trajectory (CO9)

Prioritizing Client Experience as our number one Critical Objective will achieve outcomes in seven of our top nine CO's. The potential power behind that is extraordinarily exciting. As we complete our strategies in our Client Experience road map, we will apply measurement and governance to specific goals and outcomes to assure our success.



**HOW IS THE INITIATIVE SETUP FOR ONGOING SUCCESS AND CONSISTENCY?**

The manner in how we got to this point over the past six years has laid a foundation for ongoing success. Our path has been grass roots and democratic. Our culture has transformed and is now trusting and transparent. We subscribe to a process of first raising awareness, which generates buy-in, which is followed by team alignment. Our daily practiced core values of Integrity, Excellence, Responsibility, and Rigor will guide our decision making.



Our aggressive Client Experience road map is designed to integrate into our processes and culture, beyond the initial twelve months of implementation. It incorporates strategies that link to our vision, measurements that drive continuous improvement, and governance practices that monitor and manage the quality of the Client Experience program. Our consultant, CX Pilots, is genuinely invested in our success. Their energy is motivating and contagious. This outside accountability will keep us on the path to success.

We have a detailed plan, leadership support, team alignment, allocated resources, and firm-wide commitment to carry our plan through to success.

#### **WHO IN YOUR FIRM IS INVOLVED IN EXECUTION OF THIS INITIATIVE?**

Our goal is total team alignment. The intent is for everyone at Neumann Monson to have a vested interest in Client Experience to maximize our collective effort. The management strategy will align the firm by unifying brand, content, people, processes, and technology, in order to deliver consistent messaging to clients across all channels.

Leading the charge is our leadership team of six Principals. In 2017, the Principal Team unanimously voted to make Client Experience the number one Critical Objective of our three-year strategic plan. Two of the Principals, including our President, continue to be hands-on in their involvement. Three non-principal members, including Marketing Manager and representatives from both office locations, heavily contribute to both the design and the implementation of the twelve-month action plan.

A detailed communication plan, combined with our intranet, employee blog, and ongoing dialogue, is creating inclusiveness and a transparent documentation of the plan. As the plan continues to roll out, more and more employees are on-boarded at various stages, with planned firm-wide involvement happening at multiple points. As full team alignment is achieved it will result in new roles, responsibilities, and organizational changes.

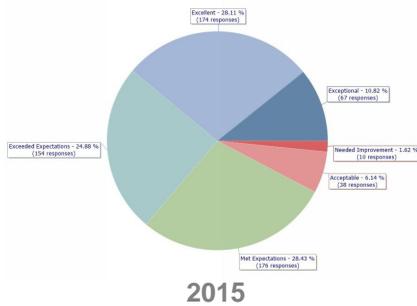


## WHAT FEEDBACK HAVE YOU RECEIVED FROM YOUR CLIENTS RELATED TO THIS INITIATIVE?

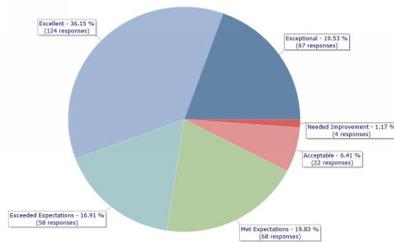
The implementation of this Client Experience initiative has not yet been publicly launched, and it is too early in the process to see all of the results. We hope the outcomes for our clients are value-added experiences and value-added results that will be able to be articulated and quantified. We want clients to see and understand this as a true differentiator that they are compelled to be a part of; where better experiences and better partnerships thrive at Neumann Monson Architects.

Over the past three years, we have implemented a voice of the customer program utilizing the Client Feedback Tool. We established a baseline of data with this tool, and trained our entire team in its use and purpose. We require full team participation, attendance at bi-monthly CFT meetings, transparent feedback, and continual sharing and learning from each other. The data from the past three years has shown consistent improved client experiences year after year from 2015 to 2017. These improvements have been recognized with the receipt of the PSMJ Client Satisfaction Awards in both 2016 and 2017. The feedback and data we receive through this tool will continue to fuel the design and adaptation of our Client Experience strategy.

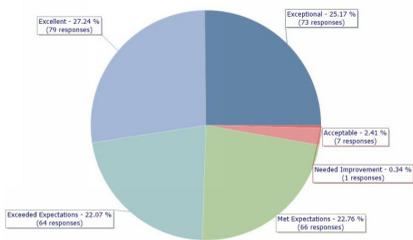
As previously discussed, employing both the inside-out and outside-in ideologies creates enhanced value and innovation. Similarly, the input and needs of the client coupled with our work and team alignment will create the output and context for a uniquely designed partnership experience.



2015



2016



2017

