CLIENT EXPERIENCE CASE STUDY
I PLE ENTIN ICE CLIENT PR RA

SME

ABOUT THE INITIATIVE

Years ago SME used postcards to obtain client feedback; however, this feedback mechanism became stale with time. While searching for a new system using electronic technology, we found the Client Feedback Tool (CFT). We chose to initiate a trial program amongst a small test pilot group, using the CFT to obtain feedback from our clients to test out the program. This test program has been very successful as we discuss in further detail below.

In May 2017, SME launched its client feedback program with a small pilot group to test out the Client Feedback Tool (CFT). Our goals for this program included:

- 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.
- 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).
- Confirm that the CFT was user-friendly for our internal users.

To plan for this effort, we started with a small "CFT" committee to develop goals, coordinate the effort, and measure results. The committee continues to meet for one hour every two weeks. The CFT committee consists of five key leaders at SME.

- 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 and Kim Looman

Robert Rabeler, our Chief Marketing Officer was our initial CX leader and transitioned that role to Daniel Roeser (who will be replacing Mr. Rabeler as SME's CMO) by the end of 2018. SME's CX Leader is responsible for the planning, implementation, review of progress, and continuous improvement of SME's CX efforts. In addition to our Voice of Client (VoC) leadership and committee, we established a pilot team to try out the Client Feedback Tool (CFT) and to establish procedures for implementation. Our pilot team consisted of 12 Project Managers and 3 administrative team members.

Our initial concept limited our pilot group to three offices and only two of our six main services areas (geotechnical and construction monitoring services). Based on discussion and feedback during our initial kick-off meeting with Client Savvy, we decided to expand our pilot effort to focus on our top clients that we could grow. We also decided it would be beneficial to learn how our clients in our newer regions view SME, so we added two additional offices.

SME's Collaborative meeting with Client Savvy was a critical element to our kick-off of this effort. At this day-long meeting, we learned of the benefits of client feedback and how the CFT would help SME improve. This meeting really energized our small team that would drive our efforts by improving our understanding of the philosophy of client excellence. The team also learned how SME could use the CFT tool to achieve excellence.

We knew how important is was to have the right people involved in this effort at the very beginning to work through issues such as coordination between administrative team members and project managers, data transition, various platform communication, and aligning understanding of client and project types. We also wanted to make sure we could make the program user-friendly for our team members. We chose our two administration team leaders to lead this effort. They now know the intricacies of our electronic platforms along with how to access and use the available data. They worked with Client Savvy immediately after our kick-off meeting to turn a possibly cumbersome data entry process into a seamless effort. That was critical for SME's pilot team to be successful at sending out surveys at the beginning of our pilot program.

Before we initiated the CFT, we requested referral contacts so that we could understand how other firms were using the CFT and evaluate how satisfied they were. We heard that other companies had struggled to have their project managers send out feedback requests to their clients mostly because they were too busy. We envisioned a similar challenge if we relied entirely on our project managers. We also learned that some firms are relying entirely on administrative assistants or marketing to send the requests. We decided early in the process that we needed to integrate our administrative staff with our project managers – forming an effective team for sending out the surveys for feedback. The administrative team members send surveys out on behalf of the project managers.

One of the members from our pilot effort (geotechnical group) decided to combine the effort of sending out requests with an operational meeting. Essentially, this geotechnical team quickly updates the status of their projects every Monday morning to make sure they are not stuck on anything, confirm deliverables, and let the team know what is new. This group of project managers marks up their list of delivered projects and hands it to our administrative team to send feedback requests. This keeps our operational side involved in the process. We are now using that same approach in other parts of our company with very good results.

SME began sending surveys to our clients on July 13, 2017. The following is our survey distribution and response results as of February 16, 2018:

	SURVEYS SENT	NO. OF RESPONSES	RESPONSE RATE (%)
3Q17	128	43	33.1
4Q17	83	25	29.8
1Q18 – 2/16/18	79	22	27.5
TOTAL through 2/16/18	290	90	30.6

We are now ready to expand our client feedback program company-wide. Ryan Suydam with Client Savvy will be presenting the CFT concepts to our project managers early in 2018 as part of our SME All-Hands Conference. Shortly thereafter, we will expand our pilot group to include all of our company project managers. Integrating our project managers with administrative team members works well for us. We are confident that if our various team operations meetings include requests for feedback, CX will become part of our culture. Currently, we work on approximately 4,000 projects per year, so we have set a goal of at least 1,000 surveys per year.

Another aspect of the CFT is integration with our FIS and CRM using the software Deltek. We recently worked through a very successful integration trial with Deltek. This integration tool greatly improves the efficiency of sending out feedback requests to our clients. We are confident that adding the ability to send a request from a platform the project managers have open, and use all day long, will improve our chances to keep our project managers engaged in CX.

In summary, we feel the following were successful efforts, or good decisions that helped our pilot program become a success:

- Start will a small, committed pilot team that stays with the program until it becomes part of daily operations. Members of this team need to understand the electronic platforms that are involved, company operations, and project manager behaviors. Building the right team will secure ongoing success and consistency.

- Invest the time to have a kick-off meeting with Client Savvy on site with project managers to work through the philosophy of CX and collaborate on what will work for your firm. (Note: Ryan Suydam does an excellent job presenting the philosophy for obtaining client feedback).

- Set a meeting rhythm for the pilot group that allows you to work through areas where you are stuck.

- Keep the Project Managers involved and integrating CX into operation meetings.

- Make it as simple as possible for your internal users and your clients.

- Track results and respond quickly to feedback.

- Develop a CFT Quick Reference Guide for your team.

NEXT AREAS TO IMPROVE

We learned from Client Savvy how important it is to respond to our clients when they provide feedback; whether the feedback is good, or whether we have issues to address. Initially our project managers struggled to respond to feedback within our published time guidelines. Fortunately, we were able to use reports built into the CFT to notify our team when project managers were not responding. Our project managers are now responding within the expected timeframes. We may need to use other approaches as we expand beyond our pilot team.

When we started our CFT pilot program, we intended to send more feedback requests to our major key clients. However, to date, we have only sent 24 surveys with 6 responses, so improving this effort is a goal going forward. We also want to focus on obtaining more feedback from newer clients working with our newer offices.

We are proud to report that our current Net Promotor Score (NPS) is 82 with only 1 detractor, 10 passives, and 55 promotors. Our goal is to keep our NPS above 80. We are also gathering numerical data on responses to our standard questions. In addition to having the numerical data, we are excited to have over three pages of comments from our clients that is a treasure chest for our marketing team. Our clients seem thrilled with our technical expertise and the value we add to their projects. We have also learned that we could really improve on our invoicing process, which should help us with our accounts receivable.

After we expand the pilot program to all of our project managers, we will request feedback from our clients on the program to see how it is changing our level of service and their experience.

We have now opened up another avenue for our clients to share their thoughts on our services and we are receiving the additional feedback that we need. Now we need to continue improving on our responses to client feedback and implement solutions at the project manager level that will take their experience with SME to the WOW level.