

## WHY did you choose to consider and implement the CX initiative chosen?

Like many firms in the architecture/engineering/construction industry, WithersRavenel was founded on—and for many years operated on—the notion that sound engineering offered at a fair price would lead to satisfied clients and repeat business. We prided ourselves on the quality of our work, and we were confident that we provided superior service compared to our competitors.

As can too often be the case when marketing is handled by one team and operations are handled by another, the message we sent to clients and the service we delivered were not always consistent. In our eagerness to position ourselves as resourceful and ready to serve, we created unrealistic expectations that typically led to one of two outcomes: we adhered to our scope of work as written and clients were disappointed, frustrated, or angry that they did not receive what they expected; or we exceeded our scope of work to meet expectations and were forced to write off the—often significant—overages in time, resources, and expense.

Our CX initiative, which we call the **WithersRavenel Way**, consists of requesting feedback at milestones tied to project deliverables: project initiation, 30% design, 60% design, 90% design, and project close-out. While soliciting comments on the design itself is baked into our process, we have relied on clients to speak up if and when they are dissatisfied with the process itself. *But our experiences have shown that even clients with whom we have an excellent relationship are not always comfortable expressing when they are unhappy.*

Our goals with the initiative are manifold. We want to give our clients another avenue for voicing their opinions, one that does not require face-to-face confrontation and instead provides a simple structure for initiating a constructive dialogue. We want to provide our project managers with the information they need to get in front of potential issues before they become real problems and find solutions that avoid or mitigate impacts to scope, schedule, and budget. We also want to empower our project managers to take total ownership of their projects, including the aspects that they do not have direct control over, because their degree of investment affects strength of the outcome. We believe that fully engaging clients and project managers will lead to more productive discussions, better problem-solving, higher satisfaction, and more repeat business.

## WHAT positive client experience outcome has your firm achieved?

The success of Client Feedback Tool at WithersRavenel is best demonstrated through a case study involving a city government in North Carolina. The city is small, with between 8,500 and 8,600 residents, and is located in a Tier 2 county according to the North Carolina Department of Commerce, which means that it experiences moderate economic challenges.

WithersRavenel's relationship with this municipality stretches back to at least 2006, and we have served as the city's on-call engineer for multiple consecutive terms providing a variety of services that include water, sewer, transportation, and GIS. Furthermore, our relationship with our chief contact at the city is even older, going back to his time working for another local government. By all accounts, both relationships were rock-solid, and we believed that our previous history would lend itself to open and honest dialogue.

In 2012, WithersRavenel provided a master plan for the renovation of one of the city's parks, and in 2016, we were hired for the follow-on task of developing construction documents and providing construction observation to bring the renovation to life. Our city contact was selected as the Project Manager for the follow-on work, which was characterized as "a simple park project."

At the outset of the project, our Project Manager reached out to the city's Project Manager to solicit feedback and establish a benchmark for the project. The response was positive: the average score for the seven-question request was 5.23, with the highest score being 6.00 and the lowest score being 4.70. He also

added this comment: “The project team has done a great job with our department. We are very happy with the results thus far and can't wait to see the project come to fruition.”

The months that followed were tumultuous for the city, involving a series of staff changes that altered the political landscape for this simple park project. The City Manager left to take a position with another municipality; an Interim City Manager stepped in to take his place, and then a second Interim City Manager took over from the first while the city continued to look for a permanent replacement. There were also changes to the City Council's membership.

Normally, some changes in client staff are to be expected and are no cause for alarm. But in this instance, each of these new staff members was also a stakeholder in the project, and each brought their own set of expectations about what the project should be, how it should be conducted, and how much it should cost. They requested design changes that were outside of the original scope of work of the contract.

Not wanting to disappoint the client, the WithersRavenel team was quick to revisit the design and make the requested changes. In our eagerness to please, however, we did not properly set expectations about how the changes to the design would affect the construction schedule.

Six months after project initiation, just prior to advertising the project for bid, WithersRavenel sent a second request for feedback to the city's Project Manager. The results were cause for some concern: while the average score for the five-question request was solidly average at 4.02, the highest score was only 4.40—lower than the lowest score from the previous response.

WithersRavenel's Project Manager reached out to the city's Project Manager to acknowledge where the firm had failed to meet expectations with regard to Schedule and Helpfulness, and to reiterate our desire to exceed expectations. He also offered to discuss other areas that may need improvement in more detail at the client's convenience.

Within the week, the city advertised the project for bid; the lowest bidder was a local construction contractor with knowledge of the area but no prior experience with this type of project. Though the WithersRavenel team had reservations, the city was obliged to accept the lowest bidder, and the Contractor was generally liked among the stakeholders who knew him.

It is important to understand that because the city is small, its ability to rigidly enforce planning and development ordinances is constrained by limited resources. The Contractor had worked with the city before, and he had come to expect a degree of freedom and flexibility in how he delivered his projects; he tended to view construction documents as guidelines to reference rather than a mandate to fulfill.

WithersRavenel's Construction Inspector (CI), by contrast, was accustomed to working in larger communities with stringent regulations and stiff penalties for failing to follow approved processes. Conflict between the Contractor and CI surfaced almost immediately as the former prioritized expediency while the latter insisted on following standard procedures. This conflict was exacerbated by the fact that the city had severely limited the amount of time the CI could work on the project, which reduced costs but also hindered the CI's ability to do his job effectively.

Everything came to a head just shy of one year into the project, when WithersRavenel sent a third request for feedback to the city's Project Manager. The results were shocking: the average score of the five-question request plummeted to 1.62, with the highest score being a mere 2.10 and the lowest score scraping the bottom at 1.20. In the comments area, the city's Project Manager repeatedly stressed the lack of communication between WithersRavenel and the Contractor and between WithersRavenel and the city, which had led to significant project delays. The CI and the Contractor were reported as “acting like infants,” causing the city to suffer.

Recognizing that a valued client relationship was in jeopardy, WithersRavenel sprang into action. Our Project Manager met with his supervisor and other members of leadership to devise a plan to communicate with the city's Project Manager and address the city's concerns. Our Project Manager set up multiple internal and external meetings to probe the issues more deeply, identify where processes had failed, and establish a corrective action plan.

First, our Project Manager spoke to the city's Project Manager, who felt that the project had been unduly delayed by lack of communication during construction. The root of the problem, however, was a lack of communication much earlier in the project, when the scope of work changed. WithersRavenel had failed to properly convey how those changes would lengthen the construction duration. By thoroughly explaining how the changes affected the schedule, our Project Manager was able to gently reset the city Project Manager's expectations.

Our Project Manager also emphasized that the Contractor's inexperience presented an additional set of challenges, and that the best way to prevent those challenges from becoming delays would be to expand the project scope and fee to allow the CI to more effectively monitor and manage the Contractor; the city consented to the increase. The two Project Managers discussed a strategy for better documenting and sharing correspondence among WithersRavenel, the Contractor, and the city, so that at any point going forward, all parties would have a better understanding of the current status of the project.

Next, our Project Manager met with other stakeholders at the city, including the Mayor, City Council, and City Manager. Up to that point, those stakeholders had been receiving a one-sided version of the story primarily from the Contractor. By speaking to them directly, our Project Manager was able to re-contextualize what had previously appeared to be needless bureaucracy as our legal responsibility to ensure the project proceeded according to local and state safety and environmental protection regulations. Viewed in this light, WithersRavenel's actions were not stalling the project but preventing it from being shut down completely. When presented with a more balanced view of the situation, the stakeholders' opinion of WithersRavenel and of the project softened. Had we not taken this step, these stakeholders may have opposed WithersRavenel's selection for future work with the city.

Finally, our Project Manager had a one-on-one conversation with the CI. He acknowledged the CI's commitment to performing his duties to the firm's high standards; he also reaffirmed the importance of following industry standards and best practices. Then he reminded the CI that the Contractor lacks the expertise we are accustomed to working with and stressed the importance of proactively coaching the Contractor through the process rather than expecting the Contractor to take the initiative on certain tasks, particularly documentation. With the scope and fee increased, the CI was now in a better position to monitor and manage the Contractor.

The entire process took approximately one month. At the next feedback milestone, the results of these efforts were immediately clear: the average score for the five-question request had leapt to 5.88, with the highest score being a 6.00 and the lowest score being a 5.8. This across-the-board improvement put the project above its pre-construction scores, and it was accompanied by a short note that said, "[WithersRavenel has] done an excellent job with this project. We are very happy with them. Thanks."

WithersRavenel ended up back on solid ground with the city and the city's Project Manager, and the project is on track to be completed by the new deadline. We are confident that the city will view us favorably for future municipal work.

We learned that even when you have a good relationship with a contact—perhaps *especially* when you have a long, positive history—it can be difficult for that person to open up and share when they have concerns or feel their needs are not being met, for fear of jeopardizing the relationship. The first inkling we had that the city Project Manager was unhappy about this park project was when he sent us 1s on the

feedback request. If we had not reached out first, he very likely would have said nothing and the entire project would have run into the ground before we knew to do something about it.

Instead, we were able to initiate a dialogue with the client, reset expectations to address some issues, expand the scope of work to deal with others, and ultimately deliver a project that satisfied the client without having to expend additional time and resources that we could not recover.

## HOW is the initiative setup for ongoing success and consistency?

Our CX initiative consists of requesting feedback at milestones tied to project deliverables: project initiation, 30% design, 60% design, 90% design, and project close-out. We have set up additional surveys to request feedback on winning and losing proposals, shortlist interviews, and routine client meetings unrelated to projects. By requesting feedback at many intervals, we can focus on specific areas of process that need improvement and fine-tune our messaging and deliverables to better set and meet client expectations.

Our Client Feedback Tool (CFT) account is integrated with Deltek Vision, the firm's enterprise resource planning software. This integration enables the firm to create and send automated requests for feedback in batches. Automated batching eliminates the need for active project manager participation, although many project managers opt to self-initiate requests for feedback.

The Deltek Vision integration and automated batching also help smooth the transition when one WithersRavenel project manager leaves a job and another takes over. The client continues to receive feedback requests without interruption, and the new project manager has access to all of the prior requests and responses, enabling them to get up to speed more quickly. In the case study in the previous section, our Project Manager left the company about 75% of the way through the job, which could have derailed the project just as it was getting back on track. But because everything had been documented, the new Project Manager came in educated and prepared to assist.

Exceptional cases like the one described here are presented to WithersRavenel staff to reinforce the value of our CX initiative and also provide opportunities to discuss strategies for dealing with negative feedback.

The results of the feedback requests are tracked on a dashboard that highlights projects where we have met or exceeded expectations. Sharing these successes with all of our project managers increases morale, and giving department heads access to the information can be a starting point for performance and compensation discussions.

Our Leadership Team, which includes C-level employees and the heads of technical departments, tracks the Net Promoter Score in particular to aid in decision-making related to business development and marketing campaigns.

## WHO in your firm is involved in execution of this initiative?

Understanding that consistent delivery is impossible without buy-in and training, we have engaged every department and level of staff in the company in this initiative. Vice President of Business Development and Marketing Eddie Staley spearheaded the initiative, building a vision of client engagement and satisfaction using CFT.

Once the initiative was approved by the firm's Leadership Team, Mr. Staley worked with the Accounting Department and IT Department to integrate CFT with Deltek Vision.

With the assistance and support of the Leadership Team, Mr. Staley gave a series of presentations to the firm's Project Managers on the purpose and process of requesting client feedback. He also developed a phased roll-out plan based on client type.

The first phase of the initiative was treated like a pilot project; it was designed to gauge client interest, test the automated processes, and identify areas where Project Managers needed additional training. The first round of feedback was not only used to promote the initiative internally but was also incorporated into the efforts of both the Marketing Department and the Business Development Department. The **WithersRavenel Way** is a standard component of the firm's qualifications-based proposals and presentations, and our business development staff highlight our use of CFT as a differentiator when speaking with clients.

### WHAT feedback have you received from your clients related to this initiative?

The most important feedback we have received from clients is their participation, because it shows that they want to partner with us and communicate more effectively to make projects a success. Clients have shared that they appreciate the extra effort at engagement, and more than one client has indicated that the WithersRavenel Way was a differentiator in selecting us over another firm.

Furthermore, they challenged our expectations about communication. While some of our Project Managers were concerned that multiple requests for feedback would overwhelm the client, there are clients who welcome the frequent touches and the opportunity to check in regularly. In the case study presented here, the contact was invited to give feedback on six separate occasions, and he responded every time.