

Baseline Client Perception Analysis: Why it is important to your firm

Client Perception surveys enable firms to understand their clients' emotional responses to working with their firm. They allow you to identify any gaps in service delivery that may be impacting your firm's ability to get the referrals you want and increase your share of wallet with individual clients. Such surveys are helpful to assess client needs, answer questions, solve problems, analyze trends, and select goals. Important to this process is to have a baseline study to better understand **what exists today**.

Individuals' perceptions are vastly different and impacted by a wide variety of factors. Everyone one of us, including your clients, looks at the work you do for them and the challenges they feel through their own lens. It's human nature. This is why it is so important to your firm to do a Baseline Client Perception Survey so your firm leaders will not be assuming they understand what their client's value. They will know what is important because their clients will tell them.

We frequently hear from perspective clients, *"Our clients will tell us what we need to know."* Then, we all smile together when they finish their baseline survey and come back with, *"Oh my gosh, we had no idea that Client X felt that way. Learning that was worth the cost of doing this. We already speaking with the client to understand what we need to do to repair that relationship."* Again, it's a question of perception.

Client Savvy's Baseline Client Perception Analysis includes:

When you do a Baseline Client Perception Analysis with Client Savvy, we will send an unlimited number of customized feedback requests to your clients from a list you provide. Our methodology, which garners a 35-55% response rate, has the request for feedback look like it comes from your team.

We keep the survey open for 15-30 days. After that our team will compile your results and give you an easy-to-read Summary Report highlighting strengths, areas for improvement, opportunities, threats, risks, and trends. We'll also dive into the data, and working with your team, discuss recommendations and develop real action plans. We don't just leave you to figure it out. The process from start to finish takes between 6-8 weeks.

Depending upon the results, the next steps we recommend often include:

- *Client Phone Interviews:* Rather than trying to schedule (and pay) for phone interviews with all of your clients. The Baseline Client Perception Survey will allow you to prioritize these calls.
- *Activating on Promoters Workshop:* Client Savvy can deliver a 4-6 hour custom Activating on Promoters Program for selected individuals within your firm in your office. During this time, we also typically hold an in-person conversation with leadership to identify future goals and strategies.
- *Client Empathy Mapping Workshop:* Our team can deliver a half-day workshop that targets a specific aspect of your service delivery process to help you close any gaps in the experience your clients receive compared to their expectations.

Client experience is not an event, it's a journey. Client Savvy is here to assist you in starting or continuing this journey.