

Client Experience (CX) acts as the glue that connects your business strategy to execution and results. No other single concept touches every portion of your business than the client experience. This is true for all professional services firms. What differentiates savvy firms from the rest is their decision to actively *manage* the client experience by creating a CX strategy to design, implement, measure, and manage the client experience.

Consider these 23 common business challenges almost all professional services firms face, and how a CX strategy brings about relief in every case. Business issues highlighted include marketing, business development, project delivery, quality, leadership, staffing, and business results.

How often do you find *the one thing* that can so completely improve nearly all aspects of your business?

- 1. We find it difficult to differentiate our brand.** Check out your top competitors' websites, social media channels, and other brand-building efforts. Do they all look and sound the same? You can all DO the work. Use your CX promise and approach to make the EXPERIENCE the differentiator. CX-oriented messaging, hard metrics & feedback, positioning all impact the brand message.
- 2. Not all our employees carry the same brand flag.** Your employees are your brand ambassadors. The best CX-oriented messaging will not only fall apart but will look like a lie if your staff don't live the CX life. Enabling your staff with CX strategies (empathy, feedback, service design, culture) provides them the framework to LIVE your CX strategy, and build the brand based on consistent, exceptional experiences.
- 3. Growth into new markets is hard.** Market entry takes a lot of time, planning, and expense. Knowing what types of clients already respond best to your existing CX allows you to target clients/markets that will be easy to serve (because they're already biased toward your capabilities)!
- 4. We grow mainly on word-of-mouth, but we don't generate enough referrals.** Creating raving-fan loyalists with tailored CX increases word of mouth. Knowing who your raving fans are enables targeted referral-generating initiatives at those fans to activate referral potential and create the introductions.
- 5. Our win-rates are low due to highly competitive environments.** Positioning your firm appropriately through a CX lens enables you to write proposals from a client-success (empathetic) perspective. You can position the experience, not just the service. Incorporating objective metrics (such as client satisfaction) adds proof of your betterness. Finally, gathering feedback on the proposal to demonstrate your CX approach triggers psychological reactions that bias reviewers to select your proposal in closely matched decisions.
- 6. Clients always want our "A-Team" and we don't have enough A-Teams to go around.** As you grow, and as staff rise in position, clients may reject efforts to introduce new players. A consistent client experience strategy helps assure all team members provide A-Team level results. Once clients begin seeing that anyone your firm sends their way is "A-Team" caliber, the client begins to transfer loyalty from the individual to the brand.
- 7. We worried about maintaining clients in succession planning.** Many firms strongest and most valuable relationships are based on a key player in your firm working closely with a key player in the client firm over years, or even decades. Client experience strategies help assure that when one of those key players turns over, the relationship and revenue remain secure after the transition.
- 8. Pricing strategies are difficult to get right – we either overcharge and lose, or undercharge and leave money on the table.** Effective CX programs focus on value creation as a foundation, avoiding the need to be cheapest. Having clear insights into each client's sentiment and perception of the firm helps identify

- when and where you have pricing flexibility, and where you need to focus first on creating value before raising fees.
9. **We don't own the majority share of wallet with strategic clients.** The cheapest growth comes from increasing business with existing satisfied clients. Improving their client experience will increase the share of work they send your way, while also reducing their price sensitivity to the work they send you.
 10. **We keep missing easy opportunities to cross-sell / up-sell with existing clients.** As part of a CX program, a comprehensive client feedback process will reveal when clients have unmet needs so you can fill them. Developing further client understanding will reveal additional needs your clients have that continue to be unmet, by you or by others. The positive feedback collected by staff will reduce the fear of offering to help in other areas, encouraging them to cross-sell / up-sell.
 11. **Change orders (and no-charges) are killing us.** We're doing work outside of scope, and frustrating clients when we do ask for more. A solid CX foundation will enable you to better anticipate the unstated needs of clients, so you can develop more complete scopes of work prior to engaging, which will minimize the need for change orders. Additionally, regular feedback to gauge sentiment will reveal when you may be "over-producing" so you can lean out delivery while still carefully meeting/exceeding expectations.
 12. **Our clients take too long to pay, and sometimes never do.** A complete CX program will investigate all the critical moments of truth for a client – including the moment they have to pay your bill. Design the invoice process to maximize "ease of effort." Gather feedback on the process to improve. Recognize that the positive feedback given acts as a psychological influencer that commits buyers to pay. These actions decrease write-offs and mark-downs, while reducing the number of days until payment. Your cashflow will improve, as will total collections and net profit.
 13. **Our focus on higher utilization has led to less time selling.** A solid CX strategy shifts focus from production (utilization) to value creation. When the whole organization is targeting value creation for clients rather than simply producing, prices (and margins) improve, lowering the need to manage by efficiency alone. Happier clients are more likely to buy more and refer you to others, reducing the need to spend as much time selling while still driving growth. Finally, a focus on high-quality experiences reduces errors and re-work, increasing efficiency - and leaving time for more selling.
 14. **Our staff don't manage upset clients well – it's hard and scary.** No one likes to deal with difficult clients, and it puts wear and tear on your staff. Consistent CX helps avoid this problem altogether. But even when you do sense a client is out of alignment, a simple feedback request can surface the issue earlier and give front-line staff the information they need to start the conversations before emotions run high.
 15. **We spend too much too much time putting out fires.** A solid CX plan works like forest conservation, you're designing systems, processes, and approaches to avoid fires in the first place, so you can re-deploy your firefighters (usually the best rainmakers in the firm) to doing what they do best – developing staff and bringing in new clients.
 16. **We struggle to define and measure quality because our product is a service.** CX shifts culture away from looking at deliverables as "the product" and positions *the experience* as the product. Coupled with rigorous measurement, each stakeholder clearly knows their role and impact on both project and experience quality, improving both.
 17. **Our vendors / sub-consultants are difficult to work with.** Complete CX strategies look at the entire experience ecosystem, including how your consultants and partners impact the clients' experience. By applying CX strategies to be better clients for *your*

- vendors, you provide vendors the incentive and motivation to be better vendors for you. Applying measurement both ways helps manage their performance, while also learning what you can do as a firm to enable their best performance for you, and by extension, for your clients.
18. **Competitors are beginning to eat into our base.** Client retention is priority #1 of any CX program. CX helps assure you not only meet clients' needs, but that you also do so in ways that are both easy and delightful. Loyalty is driven by simple and enjoyable experiences, built on healthy relationships. CX measurements helps you assess where you face competitive threats, so you can invest smartly into the areas of most concern.
 19. **Client retention for first-time clients is lower than for our long-time clients.** You aren't alone. Across the industry, first-time clients only return about 60% of the time, whereas clients who've done two or more projects return over 95% of the time. Developing a purposeful "new client experience" program assures you keep those hard-won new clients for years to come.
 20. **We want to be acquired and need to justify a lucrative valuation.** Selling a professional services firm is difficult, because the assets are primarily the people: both staff and the clients. A CX strategy, particularly one coupled to an EX (employee experience) strategy, provides reassurance to a buyer that employee and client churn will be minimal post-acquisition. Providing metrics related to client and employee satisfaction as part of your due diligence discovery helps justify the strength of your long-term value proposition, and therefore a higher sales price / earnings multiplier.
 21. **The talent war is killing us.** A strong CX program engages all employees in the value creation process, adding purpose and meaning to their daily production work. The enhanced quality of relationships they build with clients will create "glue" that keeps staff from leaving. Happy clients lead to happy employees, and happy employees become your biggest source of identifying new talent, as they refer friends and colleagues to join the great firm you've developed.
 22. **We're growing, and the new hires struggle to adopt our client-centric approach.** Culture takes a long time to develop, a long time to learn, and a long time to adopt into one's own approach. A CX framework assures you screen and hire well-oriented employees. A CX playbook enables new employees to execute immediately in a way that's aligned with your culture, while maintaining the "A-Team" consistency your clients have come to expect.
 23. **We have people-people doing production, and production-people trying to lead.** CX strategies help identify the key strengths of each staff member, highlighting those who have a natural interest in and ability to lead and interact well with clients. Armed with these insights, you can put the right people in the roles where they'll thrive. Regular feedback loops and a CX culture will develop the younger employees into more client-oriented professionals, increasing the pool of people-people to select for leadership and client-development roles.
- To get started on your path towards developing a Client Experience strategy, request our guide: "Getting Started with Client Experience" by reaching out to answers@clientsavvy.com or 919-573-1730.