Crafting Your Firm's Client Experience Workshop

By Janki DePalma, CPSM, LEED AP

Client Experience (CX) is a hot buzzword in A/E/C today. In layman's terms, CX is the experience a client has while working with you—looking beyond the products or services you provide.

Caring about the experience, versus just the technical work, is often a mind shift for many firms. After all, we're hired to provide a service, whether it's engineering, architecture, or building. CX asks, "What's it like to work with us? What's the client experience with the entire project, not just our service?"

When we take a step back and look at how our roles can make the experience better, we elevate our work. We move from being a commodity to a trusted partner.

I had participated in project success planning at a past firm, Lend Lease. Their program was a facilitated discussion that engaged all major stakeholders in an honest dialogue throughout the life of the project to promote engagement. Based on some of these concepts, plus information gleaned from empathy
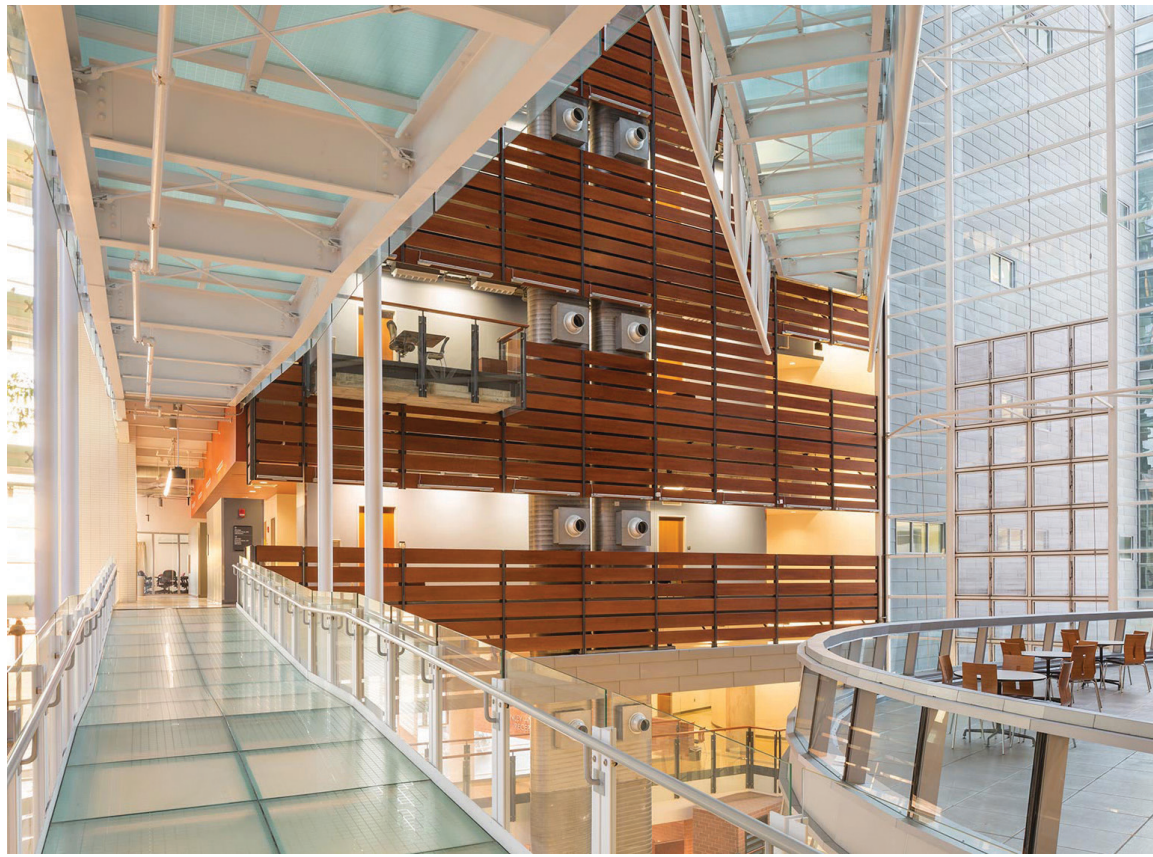
mapping, I crafted a pilot program for my current firm, which we dubbed, "The Client Experience Workshop." This two-part program first collects client data and feedback, then brings it to an employee workshop. Both technical and nontechnical staff look at all the data and brainstorm ways to better deliver client-focused service.

Here are some lessons from my journey and ways you can make this type of program work for your firm.

- **Start with your "why."** You must first figure out what your firm wants to gain by this exercise. With DCI Engineers, our why was client empathy. We're a very service-oriented firm, and we realized that when we put ourselves in our clients' shoes, we could do a better job. Your why will be your true north and help you make all decisions in the process.

- **Commit to the process.** The CX process can seem extremely emotional at first. Depending on your why, you may gather information that doesn't seem measurable. This is a good thing! Think of yourself as an

anthropologist gathering qualitative information. All the data will help you paint a bigger picture. Don't be discouraged, and remember, anecdotal data takes time.

- **Sketch out the process.** Map out your client outreach, how the data is processed, your client follow-up, and internal accountability. You don't want this exercise to be stored on a shelf afterward. Mapping helps you see the full picture, identify weak spots, and gain buy-in from leadership. Keep your why in the forefront and show how you will use this information to make meaningful change.

- **Determine survey logistics.** Will you conduct in-person, phone, or email interviews? Think about the time and money you can commit to this. How many clients will you interview and what questions will you ask? This goes back to your why. For us, we took a very broad approach and included stakeholders who are active in our work. We asked four very simple, open-ended questions based on our why, which was empathy.

University of Cincinnati CARE/Crawley Building, Cincinnati, OH. STUDIOS Architecture. ©Josh Beeman Photography, joshbeemanphotography.com.

- **Decide who interviews.** Ideally, you want the person conducting the interviews to be more of a third party who understands your firm but won't become defensive about anything said. This is key in making sure clients feel comfortable. The ideal interview should be about 15 to 20 minutes, but give yourself more time in case your client gets chatty. I found that many clients started hesitantly, but then spoke to me for an hour! Deep down, people are flattered you want to hear their thoughts and ideas.

- **Share the data.** This is the fun part! Take time to go through the data and find trends. Are your clients saying many of the same things? Work with your team to share the information. You'll start to see trends in what your clients value, what their pressures are, and the good things your firm needs to continue. If your firm allows, engage as many people in this activity as possible. We're all involved in the client experience, from administration and accounts receivable, to design and technical staff.

- **Pick (up to three) actionable items.** Be selective about what changes, actions, or policies you want to

implement based on the data you gathered. These can include a mindset change, such as encouraging more communication during preconstruction. Or, they can be new steps in the process, such as Friday afternoon email updates to clients. I cannot stress the importance of picking just a few actionable items. In the early stages, your team will be so enthusiastic, they'll want to commit to a lot of changes. Focus on a few small, achievable things instead.

- **Hold yourself accountable.** Remember those clients you interviewed? You need to make sure they know their efforts weren't wasted. Thank them for their time and tell them in writing how you're using their feedback to make changes.

Focusing on CX isn't a one-time effort, it's an ongoing commitment. The experience you give your clients is equally important to the professional services you provide—perhaps even more! A CX program doesn't have to be expensive and elaborate. It can be as simple as taking the time to ask the right questions. ∎

JANKI DEPALMA, LEED AP, CPSM, is associate, business development manager for the Austin and Denver offices of DCI Engineers, a national structural and civil engineering firm. Contact her at 512.472.9797 or jdepalma@dci-engineers.com.