

How To Develop a Client Service Program That Works

Many books and articles have been written advocating the importance of client care in the A/E/C industries. However, the literary shelves are barren when it comes to offering advice on how to create a customer-service mindset that is firmly embedded throughout your organization.

An effective client service program focuses attention on customer service throughout the project life cycle. Developing a formal client service program is a strategic decision by top management that requires commitment of resources and changes in behavior. The payoff? Your clients will reward you with repeat work, increased revenue, and an industry-wide reputation for excelling at client care. A customer-centric brand is a strong differentiator for any firm. This article provides steps to create a client service program that will put your firm at the top of your client's list again and again.

Understanding Some Basics

Your firm's top client is another firm's top prospect. With technical capabilities of most firms being equal, one thing can distinguish a firm from the competition—their customer service.

We tell more people about a bad customer service experience than a good one. The same theory applies to the A/E/C industries. Missed deadlines, untimely responses, and sub-quality deliverables will erode the trust of any client. Many clients will never tell you what went wrong with a project—they just quietly disappear. Even one misstep can cause a firm to lose thousands, if not hundreds of thousands of dollars. Because it is far more expensive to develop a new client than to care for an existing one, it makes economic sense to develop your staff—from the receptionist to the project manager to the accounting department—in the mindset of “client first.”



Step 1: Identify Quality Clients

Begin by evaluating your client list to identify the firm's quality clients. Quality clients are not only the high revenue-producers, they are the ones who pay their bills, are ethical, and reward your firm with loyalty. This evaluation can be eye-opening. One firm, for example, was surprised to find many clients who were not the highest revenue producers but were loyal for over 50 years, continuously providing projects and referrals for over a half-century. Developing a profound understanding of your top clients in terms of revenue, compatibility, and loyalty will clarify whom to target for the next step.

Step 2: Survey Only Quality Clients

How do you know if your clients are consistently receiving the quality of service they deserve before, during, and after a project? Do you know if every office is treating your clients in the same professional manner? Are you targeting quality clients? Once you have developed your list of quality clients, choose 10–15 to survey. This survey should be a personal, face-to-face, or phone interview with the client. Objectivity is critical, so using an outside, third-party consultant is best. However, the surveyor can also be a senior member of your firm. It should not be the project manager.

Your clients' time is precious. Develop no more than 10 meaningful, qualitative questions. Ask about your firm's quality of work, the project manager's



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knowledge, responsiveness, courteous communications, and trust. Ask how you could improve your service and if they would recommend you to their peers. Share this information with your project managers to identify your firm's strengths and weaknesses, with plans to address issues.

Step 3: Assign Client Managers

Assign an internal client manager to each top client. The manager is ultimately responsible for the retention and revenue growth from this client. They must command a profound understanding of the client's industry, revenue sources, and budget constraints. Client managers intersect with the clients during all phases of the project life cycle, from pre-proposal to project execution to close out. For smaller firms, the client manager could be the project manager. For larger firms, client teams can be organized to address consistency in client interactions across offices. Require teams to share client project and professional information regularly. Most important, provide client managers with budgets and the spending authority to serve the client as they know best.

Step 4: Develop Client Service Standards

Develop standards of care that your firm will provide along each client touch point. These occur throughout the project's life cycle when your firm interacts with the client. Usual touch points are project

kick-off meetings, field overviews, report delivery, final plans, project status meetings, invoicing, etc. Use your client surveys to identify what should be happening at each touch point. Are there gaps in your customer service? Where have you let the client down? How does this client prefer to communicate? By developing client service standards for all project and client managers, consistency in customer service will develop over time and quality of customer service will become standard. Codify your service standards into a formal client-service pledge. You might include this pledge in your proposals as a clear promise to your clients that service matters.

Step 5: Provide Staff Training and Share Information

Most A/E/C professionals haven't been trained in customer service. Courses in listening, communication, networking, and building trust are critical. Organize training around the service standards to ensure that consistent customer-service behavior is embedded at every client touch point. Include client service training with project management training. Set up a mentoring program to allow less-experienced professionals to tag along with client managers at project meetings.

Dedicate a Client Corner on your internal website to house the service standards and training modules. Set up a database to share customer information. Names, birthdays, hobbies, and clients' professional

associations are all part of the knowledge needed to develop trust between clients and consultants. Sharing client information among your managers is critical to the success of your program.

Step 6: Monitor Client Service Success

Implementing a client service program requires a cultural shift from product-centric to customer-centric thinking. Setting performance standards with the relevant rewards in place will support the desired behavior. Monitoring the program with quarterly accountability reviews will improve client service. Creating a career path to certify client managers with commensurate pay increases will promote staff buy-in. Semi-annual service awards celebrating client commendations will embed the new client-first mindset throughout the firm. Regularly repeat client surveys to improve the program. Monitoring success promotes and embeds consistent execution of client service across your organization.

A Final Point

Absolutely nothing happens at your firm until a client buys from you. A client service program will lead to happy clients being served by a courteous, attentive and astute staff operating with an enhanced understanding of client needs. It will increase return on investment, lower marketing costs, and keep loyal clients coming back for more. ■