

# Five Star.

The silk & steel of client experience for  
professional firms

Thirteen.Be.Distinctive.

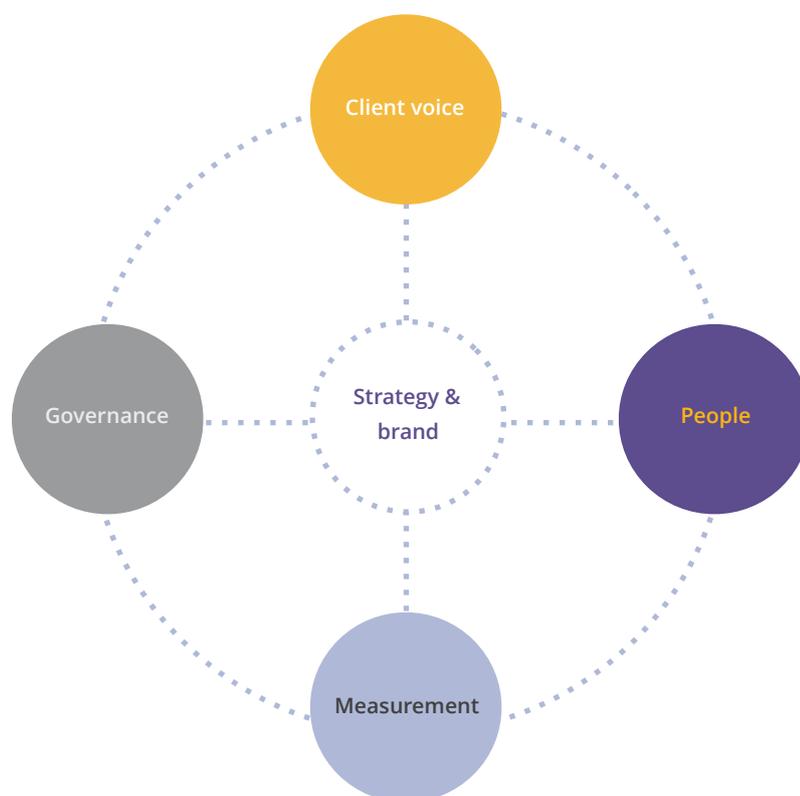
# Five, four, three, two, one.

Almost everyone's talking about client experience. But how many people actually know what it is? Let's start by saying what it's not. It's not client service. It's not client feedback. It's not key account management. It's not client relationship management. It's not client journey mapping. It's all these things & more. It starts earlier & it doesn't stop. Ever.

Michael Gove may be tired of "experts", but sometimes an expert voice is just what you need. And here, that voice is the Customer Experience Professionals Association (CXPA). They define client experience as:

*"The sum of all interactions across all channels, shaped by an organisation's culture."*

These are the five things you need to get right if you're serious about taking on client experience:



The next page takes you on a whistle stop tour through each of them. After that there's a 13 point checklist you can start using now.

## 1. Strategy & brand

As always, start with your strategy & brand. What's your brand essence & vision for the firm? What values & behaviours go alongside? How are you segmenting your prospects? What organisations & individuals are your targeting?

Answering these questions will help you understand what the client experience should feel like. It will also help you organise every part of the firm to deliver that experience consistently.

## 2. Client voice

How do your clients move through the choosing, using, paying & staying stages of the journey? What are all the different interactions that happen within each stage? Where do they differ for different types of clients? Which are the most & least important?

When you know these things, you'll understand where to invest the most time & effort, the basics you need to get right & where you to focus on standing out to deliver a distinctive experience.

## 3. People

By now you should know what to do at each stage of the client journey. But how easy it for your people to do those things? Does everyone in the business understand what their role is in delivering the intended client experience?

You should also link the client experience & people experience. People that understand what the business is trying to achieve & how to contribute will deliver more than people who don't.

## 4. Measurement

How do you measure the quality of the client experience you're delivering? How well do you do the things your clients value the most? Measurement needs to be about more than just your Net Promoter Score (NPS).

And don't just ask clients when you've finished the piece of work. It's about measuring the right things, at the right time, in the right way.

## 5. Governance

Whether you know it or not, you're delivering one of three types of experience to your clients - inconsistent, intentional & distinctive. Distinctive experiences are the most profitable & sustainable.

Your governance structure needs to be cross-functional & own client experience in the firm. It should be responsible for identifying improvements & making sure they happen.

- 1 Before you do anything, make sure you understand your firm's brand, vision & strategy. Be clear about who you're targeting, how & what you're telling them about what makes you distinctive.
- 2 Define how you want people to feel when they work with you. Pick a maximum of three emotions you want them to experience. These should link directly to your brand, vision & strategy.
- 3 Develop personas for the client journeys you're going to map. Start with the organisations & people at the centre of your strategy, then work through the others.
- 4 In addition to the basics you must do well, highlight a maximum of five moments in the client journey to demonstrate your distinctiveness. Again, these should reflect your brand, vision & strategy.
- 5 Remember the functional, accessible & emotional. Can the client do what they want to do? Is it easy for them? How does it make them feel?
- 6 Make sure your people know what their role in client experience is. They need to understand how to make it easy for clients to do what they need to & how to deliver the intended emotional experience.
- 7 Compare your employee NPS with your client NPS. Is there a correlation? Compare the NPS of different teams with the profitability of clients they work with.
- 8 Don't just measure your NPS. Also measure how easy it is for clients to work with you. Ask how they feel when they're working with you. Are you making them feel the way you want them to feel?
- 9 Try to monitor your performance at different points in the client journey, not just when you've completed the work.
- 10 There are only inconsistent, intentional or distinctive client experiences - which are costly, profitable & sustainable in turn. Distinctive & sustainable is what you're aiming for.
- 11 Your governance should include a steering committee & working group to monitor performance & implement improvements. Include people from all parts of the business on the working group.
- 12 Identify client experience champions. Give them responsibility for helping make client experience happen in different teams, sectors & countries.
- 13 Remember that client experience isn't a project. It doesn't start & finish. Done properly, it's a fundamental part of how you do things - if you really want to be client-centric.

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