My colleague recently took a trip to the mountains of North Carolina for a long weekend with his new fiancée. He had reserved a cute little cabin in the woods on Airbnb, and looked forward to some quiet down time. After a four-hour drive, they arrived – it was beautiful! The instructions in the Airbnb app said the key would be under the flower pot. But… there was no flower pot. They looked in all the usual places, and no key would be found.

Tired, frustrated, and anxious, my colleague fired up the Airbnb app and pressed the button to reach customer service. He explained the situation, and got this reaction:

> *Wow, I'm so sorry! That's got to be frustrating. Tell you what, it's dinner time – I'm texting you ten highly-rated nearby restaurants. Go grab dinner, snap a picture of the receipt and send it to me – we'll reimburse you up to $50. While you two eat, I'll get this figured out for you.*

Sure enough, by the time dinner was over, the cabin's owner texted, apologized, and told them where the key had been relocated. They got back to their private getaway, got in easily, and enjoyed their weekend.

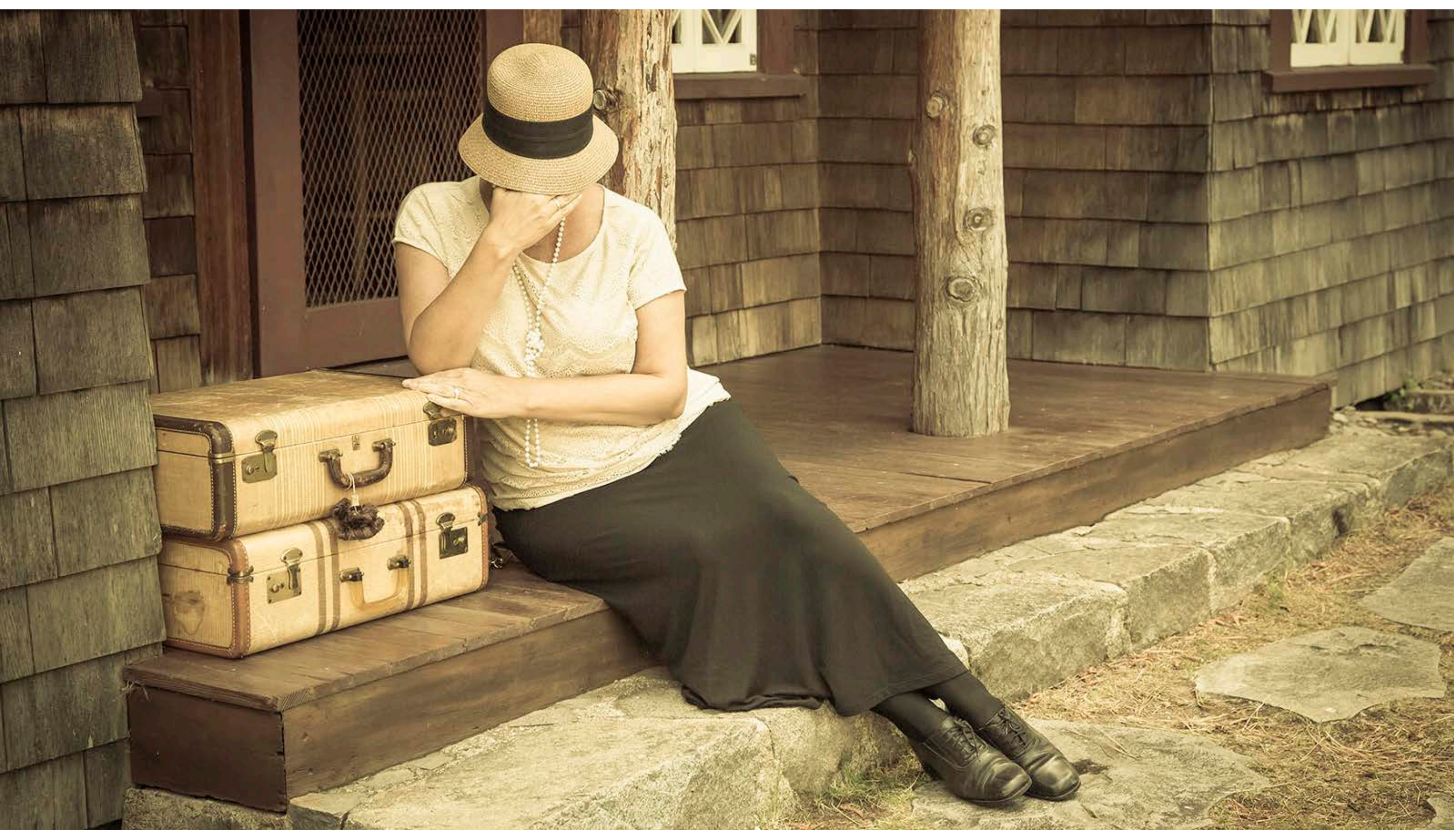
What could have been a terrible experience that likely would have prevented a customer ever returning became instead a story he shared, and now I've shared over and over.

I share this story now because it's a great vignette to start dialogue within your firm about Client Experience (CX). Parables reveal truth in ways that capture attention and interest. Tell this story, or any other CX story from your experience, and people will listen – wondering how it ends. You've got them hooked.

If you use this story, ask the question: if you were the call center agent, what would YOU have done?

They may come up with a compelling answer, eventually. Odds are, they'll be stumped. More than likely, they won't develop a great answer in the critical seconds it takes to respond to a customer, on the phone, in real time.

The Airbnb employee was able to quickly come up with a great solution because Airbnb has a plan for this. They have customer experience architects who think through the customer's experience – from signing up for the app through post-stay engagement. Airbnb even hired a Pixar storyboard artist to make four-panel cartoons of each critical moment in the customer's journey to communicate clearly to the staff "THIS is how we do things here."



Airbnb uses an intense focus on customer experience to redefine an entire industry, shaking hoteliers and disrupting billions of dollars in old-way thinking.

What if, just what if, someone in your industry did the same thing? Most professional services firms are steeped in tradition, in conservative methods, and focused so much on the *professional* they haven't stopped to really, truly, focus on the *services*. Even the "innovative" firms focus most innovation on technical practices, not on the client's experience.

What happens if you do? **What happens if your biggest competitor gets there first?**

If you want to get started on your CX journey, or even just explore what CX means, you'll find this guide a helpful primer on where to start, and how to prioritize your efforts.

Phase 1 – Introduce Client Experience Thinking
(CX Moments, Client Success Stories)

One great place to start is working within your sphere of influence.

In the weekly/regular team meeting you're part of, lead a CX Moment – a literal minute to talk about just ONE experience a client faced with your firm that week. Or, perhaps discuss an upcoming experience you want to get right. We do this at our firm. During one meeting, a conversation began regarding a great client who was 120 days past due. We launched a CX Moment right then, asking "what do we want our client experience to be when trying to collect late payments?" We had a great conversation that led us to a few simple tweaks in our process. We turned the collection call into a relationship-building moment – and we trained the whole team on it in five minutes. CX Moments are free, and start building awareness and energy across the company. The incremental improvements also create happier, more satisfied clients as service starts to change for the better.

Be sure to share successes across the company. When a CX moment from the meeting leads to a positive client reaction – tell the world! Specifically highlight successes those lower in the organization discover. Recognizing their contributions to the firm and the client will develop a cadre of "loyalists" – a grassroots movement by those who get it, and start sharing more of their own ideas to enhance the client experience and build deeper client loyalty.

Also share successes with the executive team. Teach them to include CX Moments in their meetings. Executive participation will take a grassroots movement and turn CX into a strategic priority.

You can take this one step further, and begin asking for "Client Success Stories." These are NOT moments where your firm did something great. These are specific examples of how you helped your CLIENT do something great.

For example, I recently spoke with a client; we had helped them set up a project-based client feedback process. This firm noticed they had lost a couple proposals with a long-time client of theirs, but didn't get anything more than cliché reasons why during the loss debriefs. They decided to send a feedback survey on an un-related active project, and found a couple of serious concerns the client was not voicing. After a meeting to address the concerns, the firm won a multi-year $1.5 Million project a few weeks later.

The success was completely owned by my client. I may have provided tools and training, but they activated on those resources, used them well, and created a massive financial gain as a result.

A great client success story focuses on a success that was created by the client; your role was an enabler to help *them* realize that success.

Your team may find it hard at first to distinguish between a client success and something cool your own firm did. Keep pushing for the right kind of stories. The discipline of making everyone in the room think about success *from the client's perspective* will drive empathetic thinking, and shift behaviors to be more focused on what the client actually is trying to accomplish. Recognizing a client's success is a nuanced and subtle step. Once implemented, these stories create energy towards CX and client success.

When your leaders seed the potential that CX brings, ask them to talk about CX: all the time. Together, begin emphasizing and creating a culture of the client.

Phase 2 – Institutionalize Empathy
(Client Empathy Mapping)

All clients have perceptions, sentiments, feelings, wants, and needs that you don't know about.

If you don't know, you will struggle to deliver exceptional experiences. Most experiences are built on rational transactions that are experienced emotionally. Without an understanding of the underlying emotions driving clients' behavior, you risk investing time and energy changing the transactions without actually creating the positive impact you're after.

You can gain insight about clients' potential sentiments with internal reflection, and discover their actual sentiments by asking them directly.

Anticipated sentiments are quickly catalogued and understood with a simple process called Client Empathy Mapping.

I recently facilitated a workshop at a mid-size engineering company, attended by 16 leaders and project managers. In a bit more than an hour we completed a Client Empathy Mapping exercise. First, to learn the method, we practiced on an example experience. We selected a "special event dinner with a spouse" as the subject for our map. This group, all new to client empathy mapping, not only clearly identified a few dozen critical moments and elements of their dining experience – but found five SIMPLE things a restaurant could do differently that would make their experience hugely better. And yet, no one in this group, who dine at fine establishments regularly, had ever experienced one of those five things.

In a bit over an hour, a couple dozen inexperienced people easily developed a plan to create a truly differentiated and unique customer experience.

In our final hour, we applied this technique to a "common" client persona (they called him "Fred"), and identified two-dozen potential ways to improve their likelihood of winning a five-million-dollar project coming up. They prioritized the list, and picked three straightforward action items to implement right away.

The power of this simple exercise suggests you start introducing empathy-thinking to your firm this way. You aren't focused just yet on actually executing any of the changes you come up with (though you certainly might!). The goal is to create awareness in leadership that CX isn't hard. When a dozen of your principals and leaders slow down for a couple hours just long enough to practice real client empathy, they should quickly see (and feel) the importance of understanding the client's experience – then designing a better one.

Once you've been through a "formal" Empathy Mapping session once or twice, your staff can start using quick "empathy thinking" when writing proposals, making decisions for clients, and implementing business process changes.

Briefly, break down each relationship into the five core phases of the relationship:

- **Entice** (the client associates his need to your brand)
- **Enter** (the client engages you for a project)
- **Engage** (the client receives your services)
- **Exit** (the client wraps up the project with you)
- **Extend** (the extension of relationship after the project)

Within each of these five phases, ask the following questions:

- What **questions** does the client have?
- What might he **need** to answer those questions?
- What might he **think** (positive and negative)?
- What might he **feel** (positive and negative)?
- What might he **say** (positive and negative)?
- What might he **do** (positive and negative)?

For the first two questions, you're anticipating needs and information required by the client, so you can pro-actively meet those needs and provide those answers. In the last four questions, you're figuring out the range of sentiment and behavior a client might exhibit, choosing which thoughts, feelings, words, and actions you think the client might experience.

After you have completed the questions for each phase, brainstorm actions you can take to address any negative and encourage any positive outcomes. From there, you can prioritize and design the experience to craft the best experience possible.

Pick just two or three items from the empathy map to start working on. They could be devastating negatives you work to avoid, or potentially amazing positives. If you get the experience right, you could deliver the project that sets the benchmark for all future expectations, and just might lock in a client for life.

[Want to run an empathy mapping session? Request our Client Empathy Mapping Primer]

After engaging in empathy mapping and implementing a couple improvements, continue spreading success stories across the firm. When you make changes based on empathy and observe clients reacting positively, tell the story.

With awareness spreading in both leadership and the ranks, you have reached a critical moment in your CX maturity. Before you can take on the big things, before you can really start to reshape your business and lap the competition, you need confirm your organization is ready.

If you get this far and don't have leadership support, true executive sponsorship and priority for differentiating by your client experience, don't go further (yet). Client experience initiatives aren't something implemented off to the side by a marketing or quality group. True CX change requires a cultural/organizational bias towards client empathy. CX adoption requires engagement from the bottom up, operationalizing client-centric practices at the technical professional level. The drive to enculturate CX, and create the motivation to change, needs to come from the top, even though the execution comes from the bottom.

[Is your CEO not committed to CX? Request our guide "How CX Solves the CEO's Biggest Problems"]

Phase 3 – Transform Empathy into Listening
(*Voice of the Client)*

The next step in the journey will be your first big step. Now, you have to bring your CX efforts out to your clients! You must invite your clients to participate in your CX success. You do this by creating a purposeful listening program, commonly referred to as "Voice of the Client."

Voice of the Client (VoC) includes many components, and usually begins with active listening (client feedback), but also includes mining data you have from other internal and external sources to gain more insight into each client.

While all professionals "talk to their clients", fewer have the skills and training to listen objectively and react most appropriately. Building a clear plan for soliciting feedback, and driving accountability for follow-up, focuses all front-line employees on practical strategies that impact beyond "talking to our clients". With practice, employees become better listeners in meetings, on phone calls, and in writing; while offering empathetic and more complete solutions to problems when discovered.

A comprehensive VoC program will include both active and passive research into what clients are saying and how they are behaving. Passive research might include social media channels for references to your brand. Other passive research includes gathering metadata on proposal success rates, revenue growth/decline, or tracking changes in days to collect. These sources all tell you useful information about where potential problems or opportunities may exist. You might look at spending and payment patterns specifically: if you are winning a decreasing share of your client's wallet, use that insight and seek to understand why. Just as important, if you're winning more of their work, be diligent to identify the reasons.

Every time something changes in what, when, where, or how a client chooses to do business with you, use that opportunity to learn something about the client and about your firm.

Setting up the systems and processes to monitor and recognize changes may require a substantial effort connecting systems, adjusting business processes, and more. These are also reactive metrics – lagging indicators that reveal impact long after an experience was made.

Active research, on the other hand, is much more direct, usually implemented more quickly, and has the potential to discover leading indicators, long before any negative experiences impact AR, win rates, or buying habits. Active research requires engaging the client in conversations specifically to listen to their wants, needs, and concerns. This discipline extends beyond casual "how are things?" questions during a project status meeting. A robust listening program will dedicate time and effort to the specific task of setting aside project work to seek insight into the relationship and experience of working with your firm.

Active research may include in-person, telephone, and/or electronic methods to listen. Listening may be done first or third party, may be point-in-time or continuous, and should always resolve with an active response back to the client addressing what they said.

While many possible combinations exist, we have found the following to be best practice for most professional services firms.

1. **Begin by polling a broad swath of your clients electronically.** Never collect anonymous feedback. You can't react to specific concerns if you don't know where they originated. Clients who respond *want* you to know what they're telling you, so you can take action!
2. Optionally, identify which critical clients need deeper discovery, and engage in **face-to-face or telephone interviews.** These may be major clients who haven't responded to an electronic survey, or they may be clients that did respond and need additional attention based on their response.
3. Armed with a high-level set of insights from the first two phases, design a listening plan to **solicit feedback from clients at the critical moments** in their relationship with the firm. Ongoing, electronic feedback makes this process standardized, account-able, and repeatable.
4. Commit to at least **annual face-to-face feedback sessions with each core client**; bringing the insights collected electronically during the year for discussion and review.
5. Once you've developed some confidence around the strength of your listening program, consider hosting occasional **client advisory panels** attended by a few invited clients and several from your staff. Advisory panels allow your next generation of leaders to hear first-hand what clients are asking for.

[Request our guide: "Getting Started with Electronic Feedback"]

Phase 4 – Strategy, Design, and Governance
Planning Your Success

The remaining steps towards implementing a comprehensive CX program are beyond the scope of a "getting started" guide, and presented at only a high level. After empathizing and listening – two forms of gathering insight – you now focus on using that data to standardize CX practices; ultimately leading toward a fully enculturated CX mindset.

While you have likely considered overall firm strategy when working through the first three phases, now is time to define a specific strategy that describes the intended client experience. Work with the strategic planning group to assure the CX strategy is aligned with overall company strategy and brand attributes, and is sharable with all employees. Include key functional and organizational stakeholders to ensure relational and transactional improvements are quickly made possible.

For each strategic goal in the plan, define exactly how your Client Experience supports the goal. Consider the stakeholders and their role in driving both CX and the objective. For example, growth into a new market:

Example Goal: Grow A New Market by 25%

- Governance will design our CX design for those clients to create more raving fans (Promoters)
- Our Voice of the Client program run by project management will identify the Promoters

- Our Business Development team will solicit Promoters for referrals
- Our Promoters will endorse us to their peers, driving growth in the New Market

To assure your execution achieves your goals, create a governance committee of key employees able to process all the data coming in, and recommend and implement changes to corporate processes and policies in support of your strategy.

This group will establish the criteria for how client input will be used at the company, operational, project and relationship level. They will pursue root causes of failed client experiences. They will facilitate the necessary coordination across functional groups that share responsibility for a given client experience.

As systemic challenges and common themes arise, you may want to engage in Client Journey Mapping. Journey Mapping is the "big brother" to Empathy Mapping. Here, you select a specific client persona, a specific phase of the relationship, and – in substantial detail – map the interactions, the players, the tools and handoffs of the client's experience. This map looks more like a process, and enables your team to redesign the journey for a desired future state.

Phase 5 – Enculturation

The final push of your CX program drives to the heart of who you are as a company. To fully enculturate CX, "experience thinking" needs to be core to all decision-making processes. You will make hires through the lens of CX. You will set firm strategy and promote leaders with CX in mind. Your team will, on their own initiative, identify experience opportunities, they'll work in ways that demonstrate client empathy, and everything from marketing, messaging, and brand through project delivery, accounting and finance, and IT will operate in ways that are sensitive to the client.

Why CX?
Making the Case for CX as a Strategic Priority

If you've made it this far, you probably have a good idea why CX matters to your firm.

We are living in an experience economy. You are not being compared to your biggest competitor. Experiences are emotional and personal – and from an experience perspective you're being compared to each client's last great experience. That could be Airbnb, Uber, Ritz Carlton, or any other of the leading-edge innovators in the experience economy.

Firms that have implemented CX strategies are 300% more likely to realize substantial growth in revenue and profit. These firms are more likely to attract and retain both the best clients and the best employees. Employee engagement goes up. Emergencies that interrupt weekends and family vacations go down. Nearly everything in the business improves when everyone knows how to make the clients' experience a priority.

Need to know more? Let us help develop a custom plan for you. Request a CX Strategy Session.

Ten Steps to Better CX
Getting Started: Recap

1. Start local – your team or group
2. Institute "CX Moments" at existing staff meetings
3. Begin gathering "Client Success" stories and share
4. Engage the C-Suite in talking about CX
5. Try Client Empathy Mapping
6. Begin soliciting feedback (Voice of Client)
7. Establish governance to correct systemic issues
8. Journey Map critical experiences and improve
9. Link CX to corporate strategy
10. Develop a CX culture affecting decisions and initiatives