

**CustomerGauge**

**Rehmann**  
*Business wisdom delivered.*

# Transforming Client Relationships with NPS® and CX Best Practices

Case Study: Rehmann




## Introduction

Since 1941, Rehmann has been providing financial services to small- and mid-size companies, becoming one of the largest CPA, business consulting and financial services firms in the Midwest. Their secret? Building better client relationships with the Net Promoter System®.

In 2016, Rehmann knew that in order to advance the firm's ability to deliver a consistently better client experience they needed a tool in place to keep pace with the omni-channel nature of their growing business. Rehmann decided to implement CustomerGauge's Net Promoter System platform

to help automate, monitor, report on and improve their clients' experience. Armed with the right tools, Rehmann is forging NPS and customer experience (CX) best practices to become one of the most awarded, best-in class accounting companies in client satisfaction.

We recently spoke with Mitch Reno, Director of Customer Experience at Rehmann, to discuss their decision to partner with CustomerGauge and how it helps them deliver on the "Rehmann Experience".



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## Streamlining the Client Experience and Employee Training

For over 15 years, Rehmann has been dedicated to listening to the Voice of Customer (VoC) to inform their business decisions. According to Mitch, with CustomerGauge's NPS system, Rehmann can more efficiently use their client feedback to inform business decisions:

The CustomerGauge implementation has enabled Rehmann to better understand how to maintain and grow its NPS score of 79, well above the financial services industry average of **36**. Additionally, the system has enabled Rehmann to focus on streamlining the client experience using both case management and fire-fighting features within the system. "One of the most exciting things about

CustomerGauge is the ability to do case management and fire-fighting in a timely manner. We've been able to initiate over 75 cases in the past 60 days to focus on very specific, finite issues that need to be improved with specific clients and work with our business advisors to get plans of action in place to resolve those issues quickly."

Following best practices, not only has Rehmann implemented a streamlined NPS program, but they have also coupled their program with a comprehensive client experience program—something they call the "Rehmann Experience".



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## Delivering on the Rehmann Experience

One of the biggest hurdles a company must overcome when implementing a Net Promoter System is buy-in. By enhancing their program with the “Rehmann Experience,” Rehmann has done just that. Advancing the deployment of the Rehmann Experience focuses on a number of key priorities:

- Using client feedback to provide career coaching for business advisors to enhance client experience and prepare employees for success.
- Shaping services based on client impressions and feedback to retain clients and reduce churn.
- Offering thought leadership to clients through continued engagement even past project completion dates.

Mitch Reno, a 16-year veteran of his firm, states that part of this experience includes continually listening to customer feedback to inform decision-making and training for employees in the OneRehmann Service Model approach. He calls this training and service model the backbone of the entire CX program: “We aggressively use our clients’ impressions and suggestions to shape how we deliver our services. This has shaped the formulation what we call a “OneRehmann Service Model approach,” which is used to train all of our associates to work as cross-functional teams to deliver a better client experience. Our ability to drive consistently better outcomes with clients is dependent on how well team members work together to deliver value.”

Rehmann uses this approach coupled with client loyalty, retention and NPS data to evaluate business advisors during their annual reviews. According to Rehmann, this data is very important in career path coaching and assisting their people in being the best possible business professionals they can be. In partnership with CustomerGauge, Rehmann uses a combination of this data to create customized reports for these performance reviews.

This same data, Mitch states, “...can be used for macro areas of analysis, by combining the feedback from our client surveys with lost client survey data information, we can identify similar trends. This has allowed us to, for example, develop training that will improve how we communicate and talk about fees and value of the services provided.”

Part of this training of employees includes continuing a dialog with clients long after an engagement has ended. As such, Rehmann increases the time of engagement to encourage additional connecting points to provide continued thought leadership to their clients even between engagements. For example, Rehmann offers client training on a number of hot button issues facing companies in the United States, including webinars on succession planning, free of charge.

To inform the Rehmann Experience program, Mitch and his team use data taken from survey drivers to determine what areas should be the focus of their strategy process.

## Understanding the Drivers of Loyalty and Dissatisfaction


Rehamnn prides themselves on their strong open rate of 64% on their email campaigns, and a 35% response rate. With their survey information, Rehmann can dig deep into the drivers of loyalty and dissatisfaction among their client base. This allows them to build strategic initiatives to improve client experience, raise their NPS and grow their bottom line by retaining high value clients.

During their driver analysis, Mitch and his team found that one of the drivers with the biggest impact on their NPS score and retention was accessibility and responsiveness. “It has an impact of about 18% on our Net Promoter Score,” says Mitch.

Using this type of driver analysis allows them to demonstrate a proof of concept for ramping up the continued thought leadership efforts. Rehmann has

found that proactive and fresh idea sharing is their fifth-highest driver of satisfaction among clients. To the Customer Experience team, this motivates their push to deliver even more thought leadership in the future.

However, not all drivers materialize in ways that indicate things are nice and rosy with clients. One driver that has shown measured dissatisfactions for detractors and low indication of promotion with promoters is pricing and value, which Mitch says is typical for many industries. However, as previously mentioned, these findings have enabled Rehmann to roll out more training on how employees approach the topic of billing with their clients.



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## Improved Client Experience—Paying in Dividends

Rehmann's client experience success hasn't gone unnoticed in their industry. Both in 2016 and 2017 Rehmann has been recognized with the **Best of Accounting-Client Satisfaction Award**, an honor that only 30 firms in the entire country have been recognized with since its inception.

"We were one of 14 firms in the country this year in our industry that were recognized as having a ranking of 60 or higher. Year to date, our NPS has held at 79 using CustomerGauge," explains Mitch.

Mitch attributes this recognition and the success of their program to both the best practices of the Rehmann Experience and the CustomerGauge Net Promoter platform:

"CustomerGauge allows us to take client feedback and move swiftly to focus on targeted relationships. Survey data will always assist you on a macro level of identifying trends and areas of improvement. However, once you get to a certain level of NPS achievement, it is important to continue to use software tools like CustomerGauge to help and monitor the drivers of satisfaction so you can continue to improve. But, more importantly, use the tool to access and understand when client relationships begin going 'off the rails'."



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## Contact Information

### CustomerGauge

CustomerGauge is a software-as-a-service platform that improves customer experience using the industry-standard Net Promoter System®. The system helps companies automatically measure and analyze feedback in real-time, act to reduce churn through close-loop tools and grow their bottom line.

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#### Website



### Rehmann

Rehmann Robson, Rehmann Financial and Rehmann Corporate Investigative Services form a synergistic collection of business services that make up Rehmann. Through these divisions, they offer services in the areas of tax, accounting, assurance, business consulting, wealth management and corporate investigative services. Rehmann is also an independent member of Nexia International, allowing them to provide a global approach for our clients.

#### Website