Sample Client Experience Case Studies

Below you will find a series of brief case studies of how professional services firms have used a client feedback process as part of their CX strategy to make better decisions based on objective data.

Case Study 1: Resourcing Decisions

Situation: The quality manager of a global 5,000-person professional services firm implemented a process to capture feedback from clients during projects.

Identify: One regional office had notably lower scores on the topic of "responsiveness." Every other office was +/- 0.2 points from company average, while the affected office was 0.8 points below firm average.

Analyze: One of the executive leaders had a conversation with the office manager to learn more. The office manager promptly responded "I've been telling you for months we're over-worked, and need more staff." Utilization metrics hadn't revealed a need for additional staff in the office because billable employees were spending time on non-billable administration, so the ratio was "normal."

React: Leadership, recognizing the negative impact to the client experience, approved the office manager's request for additional staff, both administrative and professional.

Result: Within six months, scores for "responsiveness" improved for the location while staff utilization remained on target. The addition of billable and well-utilized staff increased revenue for the office by over $400k.

Case Study 2: The Big Save

Situation: The VP of Marketing for a national 2,000-person professional services firm implemented a process to capture feedback from core clients using NPS metrics.

Identify: Within the first four months, five clients valued at $1.3MM annually lodged "detractor" scores, one saying verbatim "You sucked five months ago, and you suck today."

Analyze: The affected account managers discussed the client situations with the project managers, and in each case were able to collaborate on a solution to improve. The "you sucked" client was a department manager who was hearing negative sentiment from lower-level staff blaming the firm for problems that were internally created by the client.

React: After each account/project manager pair met with the detractor clients, improvement plans were put in place. Specifically, the "you sucked" client thanked the firm for identifying a source of internal conflict, and asked the firm to help resolve that problem, generating an additional $300k of fee.

Result: As a group, the five clients were all retained, subsequent feedback demonstrated positive scores, and revenues grew from $1.3MM to $1.9MM over the next 12 months.

Case Study 3: Finishing Strong

Situation: Division president of a 3,000-person regional general contractor implemented a process to solicit feedback at the middle and end of each project.

Identify: Scores at project conclusion were lower than at the mid-point.

Analyze: A linguistic analysis of comments pointed to a sense of "abandonment" once the project was near the finish line, as key staff were often re-assigned to new projects and junior staff left to finish up the details.

React: The division president changed the resourcing protocol to allow senior project executives to split their time wrapping up one project while preparing to launch new ones. Coaching was provided to junior staff to take on more leadership during close-out, assuaging concerns that the senior staff had split duties.

Result: Within one year, satisfaction scores were higher at project conclusion than during the middle of the project. Smoother transition in the close-out phase reduced aged AR by several days, improving cashflow.

Case Study 4: Using Metrics to Win

Situation: CEO of a national contracting firm was pursuing a $1 Billion project opportunity and needed evidence of excellence to satisfy the project RFQ requirement.

Identify: The CEO gathered metrics from their client feedback database and third-party recognition from a national service quality award granted jointly by PSMJ and Client Savvy.

Analyze: A marketing coordinator worked with Client Savvy to prepare a series of metrics presenting industry-leading client satisfaction, with proof, themes, and trends.

React: A narrative including a commitment to client experience was included in the RFQ along with the metrics and satisfaction award results.

Result: The project was secured bringing $1.1B in top-line revenue. Major proposals now include similar language to better position the firm for success and hit rate has increased 2-3%.

Case Study 5: Pricing for Value

Situation: Regional Business Development Manager for a 2,500-Person general contractor pursuing a second project with a new client.

Identify: The BD manager heard that several low-cost contractors had been invited to bid, so he reduced his margin by half a point.

Analyze: The feedback program manager, hearing this, provided insight from 17 surveys collected from the client during the prior project. All results were exceptionally positive, while the key decision maker included in a comment “The fees are more than reasonable for the service provided.”

React: The BD manager restored his pricing to the original level before submitting the proposal.

Result: The firm was selected, and the additional margin added over $250k in net profit. Now, before all major pursuits, the BD manager reviews past feedback performance when setting margins, leading to premium margins being used on over 20% of proposals.