

Creating a Unique Client Experience

1 Rate the current experience you deliver.

For each of your key clients, rate the current, overall client experience that you are delivering to them. Where would you classify each of them?

- Client experience is less than competitive
- Client experience is competitive
- Client experience is truly unique or differentiated

...Ask yourself: What steps can I take to move to the next level?

2 Leverage your best clients.

Use your best or “leading” clients to explore new and innovative ways to enhance the client experience. They will be more willing to invest the time and thought in exploring this with you, and the risk will be more manageable.

3 Create client networks.

Explore creating forums which pull client executives together around a sector or topical issue, leading to additional learning and an extension of their networks—and closer relationships with you.

4 Deliver value up front.

Move your value-added into the business development phase of building a new client relationship. The usual sequence is, “make contact, pitch ideas, win business.” For select opportunities you could rearrange this to “make contact, learn their business, make specific value-added recommendations, win business.”

5 Add value through technology.

Use computer-based simulations to engage clients in an exploration of key issues like risk management and market share dynamics. Use collaboration technology to create intimate links between you and your clients.

6 Review and jointly set expectations.

Create an annual expectation-setting session to review the client’s expectations, explore exactly how they would like the relationship managed, and to better understand their business priorities.

7 Explore using virtual experience environments.

These could include online forums, virtual seminars, etc.

8 Standardize the client relationship experience.

Map out every interaction the client has with you, your team, and others at your firm—at every level and through every medium (phone, in person, etc.), and assess any service level gaps.

9 Change the relationship experience environment.

Get your clients out of their offices and into new settings (e.g., a meal out, an offsite planning session, an event at your offices, a forum with other clients).