Crafting a Client Comeback Plan and Assessment

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Things have changed. They've changed for you and they've changed for your clients, and that raises some important questions.

- Exactly how have your clients' needs, challenges, and expectations changed? (They have.)
- How do those changes impact your client experience? (They will.)
- What is the risk of doing nothing? (It's real.)

If you don't have a process in place to understand those changes and the implications for your business, you're flying blind or relying on assumptions. Neither is good for your clients or your business. A client experience comeback plan should assess how client needs, expectations, and challenges are evolving and what that means in terms of:

- How often you meet with clients?
- How you meet with clients?
- Who is involved in client meetings?
- If, or how, you connect via social media.
- The tools you provide.
- The kinds of communications you share.
- Scope of service offerings.

Remember that your clients have been learning about how the client experience can evolve as they interact with other organizations. As a result, they've not only seen what is possible, but have developed new expectations – and you need to keep pace.

As you consider these questions, keep an important point in mind:

It's not the job of your clients to tell you what your client experience should be. It's your job to understand where they are challenged and what they need, expect, and a avalue to build an experience that supports them.

About Marion Thatch

Marion is an experienced marketing leader and executive coach with 40+ years of experience. She works with A/E/C firms to define and manage their brand, identify and nurture future leaders, and develop strategies needed to differentiate themselves to win more profitable work. Contact Marion at marion@b-distinct.com

ABOUT ELEVATE MARKETING ADVISORS

Elevate Marketing Advisors develops marketing and business development campaigns to invigorate your brand, differentiate your firm, and drive business to your bottom line so you stay focused on design and delivery of your discipline.

We are driven to help people and firms realize their beyond through relationship, advocacy, and an elevated client experience. We do this through a daily commitment to our guiding principles:

- Embrace Authenticity
- Reject Mediocrity
- Invest in Relationships
- Deliver with Intention
- Have Fun and Kick Ass!

To help identify the adjustments you need to make to deliver outstanding client experience moving forward, consider asking pointed questions. Your responses to the following questions will allow you to take stock of where you are and how you need to evolve.

How much contact is enough?
In this tumultuous climate, most consultants are reaching out more than ever before to reassure clients. As a result, clients may become accustomed to more proactive communication and may need additional contact to help them deal with lingering anxiety. Going forward, consultants should evaluate how often they need to meet with clients both formally (to understand how their needs are changing) and informally (to ensure they understand how clients are feeling).

How do your clients want to meet?
Almost everyone has adjusted to virtual meetings. Now that clients have been 'trained' on the process, it's important to determine if their thinking has shifted. Do they find web-based meetings more, or less, helpful or engaging? Do they see a virtual option as an easier way to engage all team members involved if some find it difficult to meet in person? Do virtual meetings open up the possibility to easily include others, such as firm resource staff or strategic partners often not included due to costly travel members or other professionals? Consultants should offer a variety of meeting formats, which may result in providing clients with increased flexibility and additional options.

Do clients want to connect differently?
During periods of isolation, we may naturally seek to connect in different ways. For some, that may mean using social media more actively, while for others that might mean taking online courses or attending webinars. Those changes in behavior might open up opportunities and/or expectations regarding how you connect with your clients. Consultants should ensure that they show up where their clients are to connect and learn. For many, that means having a strong presence on social media.

Do clients expect more 'self-serve' options?
Many firms have adopted technologies that put more control in the hands of clients, including e-signatures, booking meetings online, accessing information via a client portal, and even access to education. Increasingly clients are becoming accustomed to 'self-serve' options in all areas of their lives, influencing expectations. Consultants must acknowledge that clients have learned how to be more self-sufficient and allow clients to engage online as needed.

What challenges are your clients facing?
The most recent conversations among firm leadership show an increased interest in non-technical topics, including health and wellness. Consultants who understand the challenges their clients are facing can use that to provide personalized communications (e.g., emails, articles, resources, webinars, etc.) demonstrating true leadership. Consultants will need to demonstrate leadership through communications and ensure they are providing support on the topics that are most important to clients.

Are your clients thinking differently about what is important?
The pandemic has caused all of us to think differently and to re-evaluate many aspects of our lives. While many of those shifts are purely personal, some will impact how we plan for the future and the scope of services you provide. That may include incorporating non-traditional services (e.g., health and wellness, team engagement) either directly or via expert partners. Consultants will need to evaluate their offerings to ensure they reflect what is most important to clients.

Asking yourself the right questions is a good starting point when you are evolving your client experience. However, only your clients can tell you exactly what they need, want, and expect. For that reason, we believe that a robust process to gather input from your clients and the support to translate that into an elevated client experience is critical. Conducting a client insights survey will allow you to easily and efficiently gather input from your clients to ensure that the client experience reflects what they want, need, and expect going forward.

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