

# Client Experience Interviews

## Action Plan Template

**Providing** superior client service is *the* way for your firm to stand out from other good firms. But how do you know for certain if the quality of your client service is that good?

With an ongoing client feedback process, you gain your clients' perspectives, and they tell you what is working and what isn't. This allows you to make both specific and broader-impact improvements and elevate your clients' experiences. In so doing, you solidify your reputation as a firm who is authentically committed to serving clients.

The following questions should be answered before developing a Client Experience feedback process:

### 1) Why are you seeking client feedback?

Are you being reactive or proactive? Are you after a one-time assessment of your clients' experiences working with you? Or are you interested in developing an ongoing process to obtain and respond to clients' feedback to take your client service to the next level?

### 2) Who will oversee the client feedback project?

Executive level leadership is required to develop and support the internal processes required to sustain a client feedback project. Either a senior executive or a client engagement team led by an executive should develop and oversee the project.

### 3) Which clients will you elicit feedback from?

Consider interviewing clients based on characteristics like their size, project value, potential for growth, and possible life-time value to your organization. Consider targeting clients within a certain region of the country, those working with particular departments within your firm, or those using specific products and services.

### 4) Will you notify clients that you will be asking for their feedback?

Clients should be told in advance that they will be asked to provide their valued feedback. This will allow them to give forethought to current and past experiences with your organization and what they want to share.

Notification can be via email or personal contact from an executive leader asking them to candidly share their insights about working with your firm and thanking them in advance.

### 5) What questions will you ask your clients?

Consider:

Length

- How much time is appropriate to expect clients to spend answering the questions.

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### Question topics

- Questions are developed around the critical aspects of your process, deliverables, and the key drivers of client satisfaction. Click here to view [Client Experience Sample Questions.pdf](#)

### Question types

- Questions can be written in a combination of formats including open-ended, close-ended, or based on a rating scale.
- For rating scale questions, a scale of 1-10 is favored because it gives a broad range of options for responses and results in more finely tuned data. Using a smaller scale like 1-5 does not result in data diversity as responses typically cluster around 3 and 4 and are more likely to yield ambiguous data.

### 6) What method will you use to obtain feedback?

The two most common methods are online surveys and telephone interviews. There are distinct differences between the methods.

Web-based surveys are relatively inexpensive and quick to process, but they typically yield a low response rate, produce cryptic and incomplete answers, and lack the option to probe for clarification and deeper insights. Interviews conducted via a phone conversation require more time and expense to conduct, but they allow the option to probe for clarification to get to the heart of issues and produce higher quality and more useful feedback.

Qualities	Ability to probe	Depth of feedback	Convey empathy	Greater perceived importance	Lower cost	Quicker results
<b>Interview Methods</b>						
Web-based/email survey					X	X
Telephone interview	X	X	X	X		

### 7) Who will be tasked with obtaining the feedback?

You can manage the project internally or use an independent third party. If opting for telephone interviews, you will obtain significantly more candid and detailed responses and, ultimately, more worthwhile information if you use an independent interviewer who is unrelated to the company and impartial.

### 8) How will the client feedback be distributed, analyzed, and converted into actionable steps?

The success of a client feedback program is directly linked to how you manage the feedback. It is imperative that protocols for effectively responding to clients' feedback are in place *before* the feedback is obtained. This is especially important when a client raises an issue that needs to be responded to immediately.

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Determine how you will manage the following aspects of your effort:

- Who within your firm will receive the feedback.
- What department or individual will take the lead to resolve client issues.
- How will you identify, categorize, and track themes both positive and negative.
- How will you address recurring areas of underperformance.
- How will you recognize employees who are providing an exemplary client experience.
- How will you close the loop to acknowledge clients' feedback and thank them for it.