

**SAMPLE
REPORT
EXCERPT**

**Executive-level Analysis
of Responses**



Established 1997

Fictitious EXECUTIVE SUMMARY

PROJECT MANAGEMENT

There are many indications that Fictitious Firm (FF) does exceptional technical work and meets the needs of many of their clients. This is in keeping with FF's stated mission and marketing materials that tout a commitment to high quality products and exceptional client service. The feedback also suggests, however, that FF is not *consistently* living up to the client service ideals the firm aspires to.

Many FF projects go extremely well both in terms of the quality of the finished product and the experience working with FF. Andrew Peters of HR Hoffman Surgical echoed what many clients said about working with FF, "FF offers excellent client service. They are always concerned about our needs."

Conversely, when FF loses focus and takes their eye off ensuring clients' needs are met, it is costly. In fact, in one case it cost FF \$3-4M in lost revenue because they did not receive the contract for the second phase of Kiefer Consultant's JMX Plant Facility. Factors like ineffective issue resolution, missed deadlines, and changing project managers mid-project without forewarning clients have created a loss in confidence for some clients. Clients then look to other firms for a more professional approach to managing their projects.

POSITIVE ELEMENTS OF CLIENT SERVICE

A closer examination of the feedback reveals several key elements common in all the projects that went well.

- FF met with the client before the project began to learn about the client's expectations for communication - the preferred frequency and method of on-going contact.
- Calls and emails were returned within the same day, even when the PM did not have an answer to the client's questions.
- FF provided regular and proactive communication, especially important when unforeseen situations arose.
- FF provided timely and appropriate issue resolution.
- FF conveyed, both in attitude and action, that the project was important to them.
- FF worked in close partnership with the client's team.

REGIONAL DIFFERENCES

There was no indication that deficiencies in client service were isolated to any regional office. Across all regions there were projects that went well and some that did not go as well. What was apparent is that FF does not have a centralized way by which to track service trends and to track whether issues were resolved to the client's satisfaction, and if not, the impact of not resolving those issues.

CLIENT RELATIONS

FF's projects that result in strong client relations generally have several key elements in common – a project manager who keeps the client in the loop, is engaged in the process, and communicates well. Additionally, the most effective project managers have created cohesive project teams and maintain a high standard for all client interactions.

REWARDS OF EFFECTIVE PROJECT MANAGEMENT

Client: Chapel University
 Project: Marina Renovation (Phase I)
 Reward: **Granted Phase II of project**
 Overview: The project manager was engaged and proactive in resolving issues. He ensured that the right people were on the project and kept them on task. We particularly appreciated the project's management team suggesting that they attend what could have been a contentious local city council meeting. Their presence allayed the officials' concerns about the possible negative impact to the community of expanding the marina. The project team's conscientious efforts ensured a smooth flowing project.

Client: CityScape, Inc.
 Project: Stadium Expansion - Design Phase
 Reward: **Granted construction management of project**
 Overview: FF demonstrated their prowess in thinking outside the box with several innovative design ideas. FF conveyed that this was a very important project to them and that CityScape's interests were paramount. It was evident to CityScape that FF is an organized team of professionals.

COSTS OF INEFFECTIVE PROJECT MANAGEMENT

FF's infrastructure, in its present state, is not consistently supporting strong and effective project management.

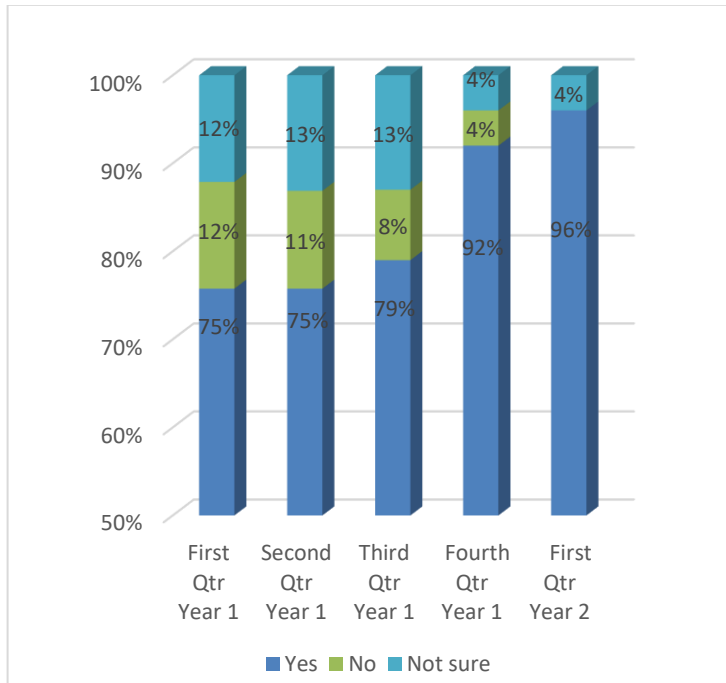
Client: Kiefer Consultants
 Project: JMX Plant Facility
 Lost revenue: **3-4 million dollars**
 Issue: The project was in peril from the start. At the 50% interview, major issues were uncovered, and at the 100% interview it was clear that FF did not take action to remedy earlier issues. FF missed deadlines and used inadequate hand-off procedures for a new project manager who came on board mid-project. "It is a shame that FF lost this \$3-4M job and any foreseeable work due to the way this project was handled."

Client: Hopkins, Inc.
 Project: Design/Build
 Lost revenue: **Undisclosed**
 Issue: We discovered early in the project that FF overlooked several important design features and they were unusually slow to complete the design as specified. "FF was an absolute shoe-in for the build side of the project, but design missteps caused us to look elsewhere."

Client: Palmer Partnership
 Project: Design
 Lost revenue: **Undisclosed**
 Issue: FF did not respond to repeated requests for more frequent project updates and timelier responses to questions. "We wanted to involve FF in the construction phase of the project, but we've lost confidence in their project management abilities."

CLIENT RETENTION

At the beginning of this project the trend for FF referrals was in decline. As the year progressed, however, and FF made improvements to their client service, referrals increased in the fourth quarter of Year 1 and the first quarter of Year 2. The challenge for FF now is to maintain this upward trend.

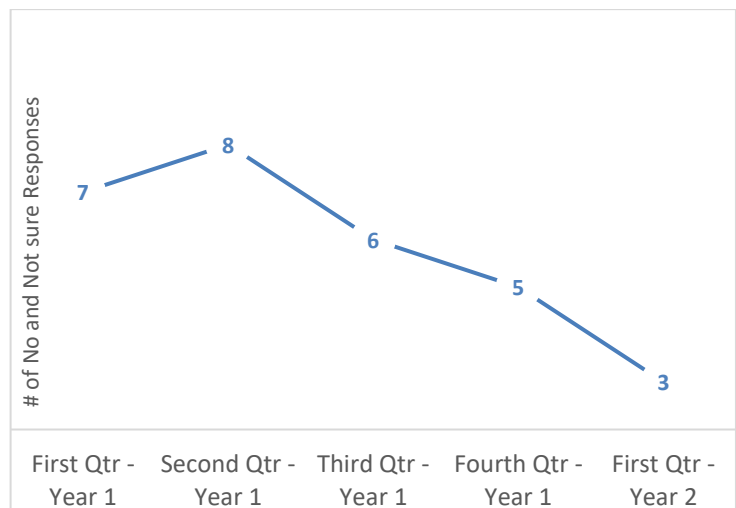


CLIENTS RECOMMENDING

The percentage of clients responding **yes** to recommending FF has increased over the course of the project. Beginning at 75%, the number of clients who would recommend the firm has steadily increased over five quarters and now stands at 96%.

CLIENTS NOT RECOMMENDING

The number of clients responding **no** or **not sure** to recommending FF has decreased over the first five quarters of the project from a high of 8 clients in the 2nd quarter of Year 1, down to 3 in the most recent quarter.



CALLS TO ACTION

- 1) Clients place high value on their positive working relationships with FF and, in particular, appreciate FF for:
 - Outstanding verbal and written communication
 - High attention to detail
 - Consideration of the client's best interests
 - Responsiveness to time-sensitive issues
 - Excellent value relative to cost
 - Top-notch technical expertise

➤ **Recognize staff for their persistent efforts to provide clients with an outstanding experience and high-quality work.**

- 2) Suggested area of improvement - ***Project management:***
 - FF was late with their deliverables. This may impact some funding. FF indicated that an increase in their workload caused delays due to insufficient staffing.
 - Some of the technical items could have been addressed more thoroughly. FF missed the motor HP sizes and did not document fire protection work.
 - Overall, FF managed the project well, but their time management towards the end was not as good as it could have been. Initially, their deliverable included omissions and errors, but FF made the appropriate corrections without delay.

➤ **Determine how to avoid issues with the timeliness of deliverables.**

- 3) Suggested area of improvement - ***Work quality:***
 - The documents provided by FF should have contained more detail.
 - The client downgraded FF's quality rating (from 10 to 8) because FF missed some important technical aspects in their work.

➤ **Determine what led to clients' dissatisfaction with the completeness of submissions. Were there miscommunications about expectations or oversights by the project team(s)?**

- 4) Suggested area of improvement - ***Problem solving:***
 - Because FF requested a time extension, the client concluded that FF was adequate with problem solving but not great.

➤ **Going forward, is there a way to avoid similar deadline extensions or does the client need to be made aware of the reason for the extension?**

5) Suggested area of improvement - *Value*:

- FF's deliverable was appropriate but priced too high. (6 rating)
 - FF is in the middle of the pack as far as value. They are reactive and do what is asked of them. Without expertise in pavement engineering, it is challenging to be proactive to the point of anticipating the client's needs. They are getting better. (7 rating)
- Consider explaining the project fee justification to improve the client's perception of the fee.
 - Will FF miss out on future pavement engineering projects without having more expertise in-house?

6) Additional concerns:

- My preference would be to have a few more seasoned individuals on the project team. Though the relatively young team has talent and energy, I am not sure they have the depth of experience to manage this challenging project. I am assuming they are being mentored by senior FF staff, but not entirely sure.
- If applicable, reassure the client of FF's senior staff oversight and mentoring process related to his project team.

RESPONSES TO RECOMMEND QUESTION – by Regional Office

Comparing 50% Interview Responses with 100% Responses

FIRST QUARTER – YEAR 2

Regional Office	CA	FL	MA	NC	NJ	NY
INTERVIEW TYPE	50%/100%	50%/100%	50%/100%	50%/100%	50%/100%	50%/100%
# OF INTERVIEWS	7 / 9	6 / 3	3 / 2	4 / 3	8 / 5	6 / 7
50% INTERVIEW Would recommend	Yes – 100% No – 0% NS – 0%	Yes – 100% No – 0% NS – 0%	Yes – 77% No – 0% NS – 33%	Yes – 100% No – 0% NS – 0%	Yes – 80% No – 10% NS – 10%	Yes – 85% No – 9% NS – 6%
100% INTERVIEW Would recommend	Yes – 93% No – 13% NS – 0%	Yes – 100% No – 0% NS – 0%	Yes – 96% No – 14% NS – 0%	Yes – 89% No – 11% NS – 0%	Yes – 90% No – 20% NS – 10%	Yes – 100% No – 0% NS – 0%

YEAR-TO-DATE CUMULATIVE RESPONSE COMPARISON

<25%, 50% AND 100% PROJECT COMPLETE INTERVIEWS

Number of Clients Interviewed	21	24	77	122
Interview Type	<25%	50%	100%	Averages
Expectations – Budget	NA*	Exceeded – 0% Met – 62% Not met – 24% Not sure – 14%	Exceeded – 6% Met – 69% Not met – 21% Not sure – 4%	Exceeded – 4% Met – 67% Not met – 22% Not sure – 7%
Expectations – Quality of work	Exceeded – 28% Met – 72% Not met – 0% Not sure – 0%	Exceeded – 22% Met – 61% Not met – 17% Not sure – 0%	Exceeded – 29% Met – 59% Not met – 11% Not sure – 1%	Exceeded – 26% Met – 60% Not met – 13% Not sure – 1%
Expectations – Client service	Exceeded – 25% Met – 75% Not met – 0%	Exceeded – 26% Met – 64% Not met – 9%	Exceeded – 28% Met – 66% Not met – 6%	Exceeded – 27% Met – 66% Not met – 7%
Rating - PM (1-10 scale)	7.6	7.4	8.2	7.9
Rating – Problem resolution	8.0	7.6	8.4	8.0
Rating – Technical competency	8.6	8.6	9.0	8.8
Expect goals to be met	NA	Yes – 86% No – 0% Not sure – 14%	NA	Yes – 86% No – 0% Not sure – 14%
Would make same decision again	NA	Yes – 80% No – 4% Not sure – 16%	Yes – 87% No – 9% Not sure – 4%	Yes – 85% No – 7% Not sure – 8%
Would recommend	NA	Yes – 83% No – 4% Not sure – 13%	Yes – 86% No – 6% Not sure – 8%	Yes – 85% No – 5% Not sure – 10%
Strength of recommendation	NA	Strong – 79% Moderate – 21% W/reserv. – 0%	Strong – 83% Moderate – 15% W/reserv. – 2%	Strong – 82% Moderate – 17% W/reserv. – 1%

* NA – Question not asked in interview type.