STEP MARKETING PORTAL
MARKETING INFORMATION RESOURCE FOR STEP MEMBERS

Essential Top Tips: Client Care and Relationship Management

Introduction

Client care and overall service quality is probably the single most important factor that will help professional service organisations secure long term repeat custom from clients as well as help stimulate referral from friends of the organisation and also from loyal clients who become advocates for the organisation.

It is odd therefore that this aspect of marketing often secures little managerial attention. The justification for this is typically along the lines of ‘if clients had problems with our service they would tell us about it.’ The belief is that without a steady stream of formal complaints no action is required.

This approach is extremely dangerous. Client expectations regularly evolve and small variations in client needs that have not been picked up and addressed by an organisation can result in client defection. Whilst a catastrophic failure in service levels may well result in a formal complaint or a loss of custom this is not the whole story. It is essential that an organisation is fully focused on meeting the changing needs of clients and assuming that the organisation is meeting client needs without feedback is of course potentially dangerous.

Culturally and operationally organisations need to be focused on not only meeting client needs but where possible exceeding client needs. Expectations are ever changing and organisations need to react to these changes or face a very uncertain future. It is worth noting that service failure in itself may not be the only reason for client defection. Increasingly clients will defect as a result of ‘perceived indifference’ to their custom.

Ensuring Service Quality

Many organisations claim to be client focused and committed to service quality. It is something of a given. The realities of delivering service quality require sustained organisational commitment across all functions.

Inevitably the personal beliefs and actions of senior personnel help set the tone for an organisation. It is highly unlikely that an organisation will build a reputation for service quality if the actions and beliefs of the senior team do not endorse this.

Service quality and client focus needs to be an all-encompassing commitment that begins with recruitment and induction, runs through on-going training (formal or informal), is reviewed during employee appraisals and is seen as central to all job functions. In short service quality and client care is a day to day responsibility for everyone within the organisation.
There are formal quality management systems that can be adopted by organisations looking to proceduralise quality management issues. However, organisations can achieve a great deal by looking at the following processes from a service quality and client focus perspective.

- **Induction.** Do service quality issues feature as a component of the induction process and is the role of the employee explained in this respect? Is adequate training given before the employee begins supporting clients?

- **Defined processes and procedures.** Does the organisation have clearly defined processes and procedures to ensure that service levels are consistent?

- **Measurement.** Is it possible to measure service levels? What are the key service variables from a client perspective and can these be tracked on an ongoing basis?

- **Training and reinforcement.** Are service quality issues central to employee training and is service quality a central component of appraisals?

By considering the above questions it is likely that an organisation can identify ways in which service quality and client perception can be enhanced.

**Gathering Client Feedback**

To understand client needs it is important to obtain regular feedback in relation to organisational performance and on the changing needs and expectations of clients. It is also important to look at the most client friendly means of gathering feedback. Some organisations make good use of surveys. These need not be simple paper based feedback forms. They could be accessed via the web site, could be performed via a short but useful telephone survey, compiled on a representative sample basis or even via a small representative focus group. What needs to be avoided are mechanical processes that can appear ‘token’ and in some instances damage the perception of an organisation due to their poor execution.

Referral bodies should also be included in this process. The perception they have of an organisation can be very useful in understanding the wider viewpoint of the business and they are often well placed to provide an objective perspective.

The information gathered will likely be observational and in some instances hard to quantify however themes can be determined by reviewing the comments made by clients and referral bodies. Where measurement is possible this should ideally include measurement of not only the level of service provided but also how important this aspect is to the client. Without this importance component organisations can end up setting inappropriate goals for themselves.
Example Client Feedback Sheet

<table>
<thead>
<tr>
<th>Area of Service</th>
<th>Importance Score</th>
<th>Performance Score</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Reception experience</td>
<td>4</td>
<td>4</td>
<td>Short wait on last visit. Poor reading material!</td>
</tr>
<tr>
<td>2. On-going communication</td>
<td>7</td>
<td>5</td>
<td>When John was on holiday communication was a problem.</td>
</tr>
<tr>
<td>3. Professional knowledge</td>
<td>9</td>
<td>7</td>
<td>Gap in scoring is due to variation in knowledge. John is impressive, others seem inexperienced?</td>
</tr>
</tbody>
</table>

Delivering Change

Gathering information in itself will not result in organisational change. The information obtained needs to be analysed and then translated into action points. These actions could be relatively simple to implement such as, ‘improve the quality of reading material in reception’ through to more complex issues such as ‘enhancing the client experience when using the web site.’ Sharing the action plan, perhaps in précis form, with those who provided the feedback information is often beneficial in that it shows a level of commitment to the process and guards against a sense of tokenism that some organisations can be guilty of.

Innovation

Research and development is the life blood of manufacturing organisations but it can be seriously lacking in professional service organisations. Much management time can be given over to revenue analysis, work in progress and operational costs but little time is spent on looking at enhancing processes and procedures.

Without a cultural or procedural commitment to on-going innovation it is unlikely that an organisation can achieve its full potential. Process improvement and innovation can appear rather daunting. This need not be the case. For example, a client feedback exercise may have identified speed of document processing as a concern. A small group from within the business could then be pulled together to analyse the existing processes and identify areas where inefficiencies and unnecessary delays exist. By looking at small component parts of a process and tweaking them improvements can often be made. This approach is often more fruitful than simply starting with a blank sheet of paper and hoping for a ‘Eureka’ moment.
SUMMARY ACTION POINTS

1. Ensure adequate training is given to employees at the outset and explain in detail what service quality means to them and how they must deliver it.
2. Use formal procedures and processes to ensure consistency of delivery.
3. Measure performance whenever possible.
4. Use training and appraisal to reinforce commitment and to help stimulate organisational improvement.
5. Monitor client feedback in a client friendly manner, identify areas for improvement, share the results and act upon them.
6. Review client facing procedures and commit the organisation to continual improvement.
7. Service quality, innovation and process improvement is everyone’s responsibility.

For more information, or to give your feedback on STEP’s Essential Top Tips, please contact the STEP Marketing team:

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