

SHAPING CLIENT EXPERIENCE THROUGH TEAM COACHING



For me, nothing is more important than truly understanding activities and actions that can deliver a more satisfied client. In a highly complex and competitive business environment, the firm that puts shaping a stand-out client experience at the heart of its business will be more successful overall, attracting and retaining the best talent and winning the most professionally satisfying and profitable work.

What of the role of marketing in shaping excellent client experience? I firmly believe strategic marketing is produced through marketers acting as the voice of the client inside an organisation. We've heard for years that clients seek more than technical excellence in professional advisers. We know commerciality, team work, strategic insight and the ability to see the world through the client's eyes are paramount. But how exactly do you achieve this often elusive goal?

Firstly, marketers must question their own assumptions and test the validity of long-held views about the nature of clients' needs and wants. When focusing on delivering what is urgently required every day, it is hard to challenge yourself and others around what might be done differently or better to improve client experience. Yet I believe this is the only way to innovate and create change to truly benefit clients.

What better way to start than by carving out time to think? Forget the meticulously planned 'away day'. How about a 'stay day' - a couple of hours in a quiet room with colleagues willing to participate in team coaching around the goal of shaping client experience. Gather facts and figures, seek out client feedback, and check out recent relevant external reports. Just don't delay the goal whilst pursuing perfect information.

Step back and step up to the hard task of contemplating how you can work differently. Ask each person "how can we use what we've learned to move our firm closer to true client-centrism?" Perhaps even more importantly, "what can you personally do to get this firmly on the agenda of senior management?"

Keep going until ideas dry up and then ask "what else"? It is amazing how this simple yet powerful coaching question can energise people into bolder, more innovative thinking. At the end of the session, sweep up and evaluate ideas, then get stuck into action planning.

Seldom do we have the opportunity to step back from the maelstrom of everyday working life to consider strategic issues from a client perspective. And yet, how else can marketers become more valuable to their firms than by listening, interpreting and translating the client's voice, while pushing forward practical initiatives to advance the strategic agenda of a sharply-managed firm? ●

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