

Client-focused cultures

Are your customers wowed by the value you're providing? **Interviewed by Jerry Roche**

If we live in a service economy, where's the service? That question is asked hundreds of thousands of times a day by disgruntled customers, right here in the good old U.S. of A.

Are they asking it of your company?

"Client service really crosses over all corporate disciplines," says Mike Trabert, CPA, CVA and a partner at Skoda, Minotti & Co. "With effective client-focused cultures, the goal should be to exceed the client expectations, not just meet them."

It would be easy to say that a client-focused culture might lean heavily on technology, teamwork, processes and customer account planning. But that's not putting the proper emphasis on the people aspect: from upper managers, who define the culture; to middle managers, who administer the culture; to customer-service employees, who are on the front lines and dealing with customers on a regular basis.

"All the team members are responsible for breathing life into a culture," says Trabert.

Smart Business asked him to list some ways a business can attain a truly client-focused culture.

What are the warning signs of an ineffective client-focused culture?

Walt Disney once observed, 'Just when everyone is saying how great we are is when we're the most vulnerable.' It's a reminder that a client-focused culture must be both maintained and improved.

If clients don't perceive additional value from the services you provide, they tend to deem your services as a commodity and would be more apt to question fees. In addition, not providing client service training, both formal and on the job, indicates that there's not enough focus on the culture.

Ultimately, the loss of clients would indicate that you're not providing the services the client deserves.

What are some of the factors that separate effective client-focused cultures from ineffective ones?

Ideally, you want to over-promise and then over-deliver on the over-promise.



Mike Trabert, CPA, CVA
Partner
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An effective culture needs to be strategic. A lot of small things can be done in the area of client service, but they should be part of an overall plan. The focus should be on adding value to the client. It's also important that there be a training and mentoring program so that all clients receive the same high level of service.

In any aspect of a business, you have to pull yourselves out of the day-to-day operation and think more strategically. Effective programs also focus on internal service as well as external.

How can a company go about creating an effective client-focused culture?

First, the programs have to be strategic in nature, and there has to be a buy-in from all team members. Then, a vision has to be established. Next, determine the approach to achieve the client service mission. Finally, incorporate specific strategic goals into the approach to achieve the mission and the vision.

The bar should be set high. Companies face not only direct competition but also indirect competition. Your customers know what superior customer service is through their personal experiences with companies like Disney, Ritz-Carlton and Nordstrom.

Who plays the most important role in making a client-focused culture effective?

Initially, upper management needs to determine the client focus culture, but once that's established, all the team members are responsible.

For example, in our business the partners might decide clients would be better served by using an integrated client relationship management (CRM) system whereby all activities relating to the client are entered into the system so that anyone in the firm associated with the client knows what's going on. All team members play an important role by recording the activity as it occurs, and the technology department sees that the system continues to operate smoothly. Everybody's involved.

With a larger organization, it would be more challenging to communicate all client interactions, phone calls, e-mails and meetings, etc. without a centrally managed database that all team members are using.

How do you deal with errors?

Everybody makes mistakes.

The ideal is to have client service recovery procedures, which are different for individual businesses.

The main thing is that everybody should know how to recover from a situation that's in their part of the client interaction — to make it right as soon as they can. It's one of the most overlooked parts of any training program.

How do you determine whether your new corporate culture is, in fact, becoming more client-focused?

If you're doing it right, you're going to hear more 'wows' or heartfelt thank-yous from your clients. Referrals will continue to be strong and may even increase.

The best cultures also have tools in place to measure the results, and they have accountability.

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