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26 FUNDAMENTALS THAT DEFINE OUR CLIENT EXPERIENCE PROMISE

A personal connection with clients is at the heart of client experience, but client connection means different things to different people. Having an intentional CX brand consistent across our entire firm will make client connections that drive positive results. If we embrace these 26 fundamentals, we will increase client loyalty, our share of wallet, and our client will become active promoters for WithersRavenel.

Client Experience DOES NOT mean;

- ❑ Doing something that is not feasible for our team, unethical, or makes no financial sense to our firm.
- ❑ Abandoning core processes of how we work or adding extra steps that provide no client value.

Client Experience DOES mean:

- ❑ Understanding what about our firm's project delivery matters most to our clients.
- ❑ Recognizing each client may have different priorities or preferences. ❑ Aligning our project delivery to match the clients expectations.

WithersRavenel's brand promise is "Our People. Your Success." Client

Experience is about what each of us do everyday to live up to our brand promise. Please join me in putting these 26 CX Fundamentals into practice with every client.



L. Eddie Staley, PLS, GISP
CXIO

COLLABORATION QUALITY

UNDERSTAND THE
DEFINITION OF SUCCESS

BE A GOOD TEAMMATE

SIMPLE

BE PROACTIVE &
TIMELY

ON TIME - ON
BUDGET

ALWAYS
FOLLOW-UP
MAKE QUALITY PERSONAL
MAKE THE COMPLEX

OPPORTUNITIES
NO CRICKETS -
ALWAYS RESPOND

REDUCE DELAYS
& SEE

UNDERSTAND, THEN
SOLVE

2 6

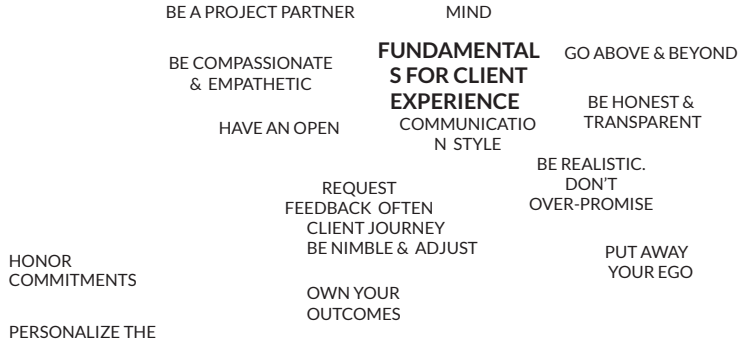
PAY ATTENTION TO
DETAIL

RESPECT^T WITHERSRAVEN
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RESPECT CLIENT, STAFF &
LOCAL KNOWLEDGE

CELEBRATE
SUCCESS

KNOW YOUR CLIENTS'

COMMUNIT_Y



SUSTAINABILITY INTEGRITY MAKE QUALITY PERSONAL

Our clients expect a high caliber of work. To exceed their expectations, we must understand their “why” and then find ways to tailor our processes, particularly our communication, to that reason. Personal touches increase perception of quality, which is just as important as quality itself.

ACTION

Make a note of client preferences and follow through on them throughout the project.

ON TIME - ON BUDGET

A client kick-off meeting is our first opportunity to fully understand the overall goal and scope of the project as well as the client's expectations. Seek consensus on the schedule and budget, and don't be afraid to ask if the client anticipates any potential changes.

ACTION

Ask the client if they may need any additional services not previously requested. Discuss what challenges may affect the project scope or budget and contingencies for dealing with them.

MAKE THE COMPLEX SIMPLE

Be succinct. Avoid lengthy opinion statements and stick to the key information the client needs to know. Answer

questions directly.

ACTION

Use plain language and be succinct.

Avoid or explain acronyms and jargon.

BE PROACTIVE & TIMELY

Don't wait for an email before updating a client. Don't assume silence means they aren't waiting. Develop a communication strategy at the beginning of the project to maintain proactive communication.

ACTION

Develop a schedule during the kick-off meeting.

Set reminders. (Outlook, OneNote, to-do list)

NO CRICKETS - ALWAYS RESPOND

Sometimes we hesitate to respond to clients. Remember that bad news is better than no news, and it's always nice to be acknowledged. By addressing items up front and providing a plan for resolution, you can set the tone moving forward.

ACTION

Respond productively and with a plan of action.

PAY ATTENTION TO DETAIL

Small omissions or mistakes can snowball into huge consequences. Take advantage of processes and tools that standardize or streamline common tasks, and don't skip the review or comment phases of a project. Every deliverable can benefit from a second set of eyes.

ACTION

Budget for potential Change Orders at the outset of the project. Perform standard QC procedures for plans and specifications to limit the need for

change orders.

CELEBRATE SUCCESS

Don't overlook a job well done! Enjoy success with your client. Help the client feel proud of the work you did together and tell the story to others. In every success, understand what actions fostered the success and what we could do even better next time.

ACTION

Engage Marketing to help tell the story.

Share your pride in a job well done with the client.

Empower the client to tell others of our mutual success.

KNOW YOUR CLIENTS' COMMUNICATION STYLE

There's no shortage of communication methods, and

everyone has their favorite. To set the project up for success, it is important to acknowledge our clients' preferred method may differ from our own.

ACTION

Use a project kick-off sheet to list preferred communication style with other important project details.

GO ABOVE & BEYOND

The smallest actions can mean the most for our clients. In a crowd of competitors, thoughtful gestures like sending a handwritten note or bringing a snack to a meeting set us apart and elevate the client experience we provide.

ACTION

Ask clients to rate meetings and take action based on their feedback.

Make a note of personal details and ask about them later.

Participate in local events.

BE HONEST & TRANSPARENT

In the absence of information, people draw their own conclusions. Their perceptions—good or bad, true or false—influence their actions. Honesty and transparency are therefore necessary to build lasting trust.

ACTION

Adhere to the established communication plan.

Acknowledge when you can be flexible with services or pricing to fit the client's needs.

OWN YOUR OUTCOMES

We can't always control or affect our circumstances, but as project managers we must always take responsibility for our projects. If we refuse to take ownership of our failures, then we forfeit the right to celebrate our successes.

ACTION

Predict and share expected outcomes of the project with the client before the project begins.

PUT AWAY

YOUR EGO

Bringing a project to fruition takes many skillsets, and no individual has them all. Approach stakeholders with humility and listen to their concerns and ideas. They can tell you how they will gauge the project's success or failure.

ACTION

Take time to identify and engage stakeholders.

Ask yourself "how can it be done?" instead of jumping to why it can't.

BE REALISTIC. DON'T OVER-PROMISE

Be cognizant of our backlog and capabilities as well as the client's scope and budget when deciding to submit a proposal. Develop a timeline of internal and external stakeholder deadlines. Invite all internal teams involved in developing the schedule to the project kick-off meeting. Make sure every project has buy-in for the deliverables and schedule.

ACTIONS

Make the schedule available to all team members and put in prominently in the project delivery. Discuss the schedule with the client to ensure alignment of expectations.

BE NIMBLE & ADJUST

As our clients' needs change, we will adapt quickly. We utilize technology, proactive communication, and the desire to be solution-driven to create success. Being nimble and adjusting to each clients' preferences ensures a productive and sustainable relationship.

ACTIONS

Ask "What is their definition of success?" often.

Make adjustments based on Client Feedback.

Always find ways to make the client's job easier.

REQUEST FEEDBACK OFTEN

Use a variety of methods to request feedback, including in-person visits, phone calls, WebEx meetings, and Client Feedback Tool. Leverage Client Officers and Business Development Leads, who often have relationships with the

client but a degree of separation from the project, and can therefore elicit more candid feedback.

ACTIONS

Share updates regularly among the Project Manager, Client Officer, and BD Lead.

Use Client Feedback Tool throughout the contract to respond to feedback.

PERSONALIZE THE CLIENT JOURNEY

How does a client feel during the execution and completion of a project? Solutions often have similarities from project to project, but client desires typically do not.

ACTION

Identify common goals and project intent.

Follow up—have the goals been met?

HONOR COMMITMENTS

We can't take on every project or satisfy every client demand—no one has the resources to do everything all of the time. Honoring commitments means being prepared to reschedule non-critical tasks, ask for help, and say no to new opportunities in order to see things through to the end.

ACTION

Set realistic delivery goals.

In times of pressure, determine if an interim deliverable meets client commitments.

HAVE AN OPEN MIND

Having an open mind begins with listening to a problem before assuming we know the solution. Open-mindedness thrives in environments where everyone can contribute without fear of failure, and where each professional brings different knowledge and experiences. It leads to win-win-win opportunities for us, our clients, and the bottom line.

ACTION

Engage the client's input from the start to ensure solutions are practical. Allocate resources for collaborating on known & unknown problems and vetting solutions.

BE COMPASSIONATE & EMPATHETIC

We may believe we know what's best for a client, but without empathy and compassion, we won't succeed. By asking clients good questions and then actively listening to the answers, we can discover what they really need.

ACTION

Thoughtfully prepare questions for meetings.

Practice active listening by paying attention, deferring judgment, and providing feedback.

BE A PROJECT PARTNER

We seek to help our clients with all aspects of a project in which our company has expertise, not just the ones for which they initially hired us. We demonstrate an ongoing

commitment to their success, and thus become an extension of their staff. Their success is a reflection of our company.

ACTION

Communicate regularly and often.

Look for opportunities to connect the client to subject matter experts within the company.

RESPECT CLIENT, STAFF & LOCAL KNOWLEDGE

We've never been hired to tell a client they're wrong. In order to fill the gaps in a client's resources and complement their ability to provide essential services, we must understand their knowledge, qualifications, and history. Appreciating the client's achievements is the first step to building mutual respect.

ACTION

Ask questions related to regional knowledge.

UNDERSTAND, THEN SOLVE

Often problems are attacked before they are fully understood.

The “what” and “when” allow teams to move forward with generic approaches, but when we ask “why,” unique solutions can really begin to form. By allowing clients to define why they want a project to proceed, teams at WR can provide solutions that mirror our clients’ desires in a more direct fashion.

ACTION

Keep the “why” in mind.

Ask probing questions.

Understand the goals and definition of success.

REDUCE DELAYS & SEE OPPORTUNITIES

Unfortunately, project delays inevitably happen. As we encounter time obstacles, we need to identify them clearly with our clients. Our clients will be looking to us to help find creative ways to address issues and, if possible, gain any lost time back.

ACTION

Review potential schedule items that may cause delays at the kick-off meeting.

Suggest methods for mitigating potential delays, if possible.

During a project delay, immediately begin planning ways to accelerate the response, with the goal of minimizing the delay.

ALWAYS FOLLOW-UP

When we know how we did and where we stand, we can take steps to replicate positive results and avoid future negative results. By gathering feedback and applying industry best management practices in project management, we can generate repeat business.

ACTION

Schedule and review feedback using Client Feedback Tool.

Follow the PSMJ Project Close Out Process.

Set up reminders to call and follow up.

BE A GOOD TEAMMATE

We know what it means to be a good teammate to our co-workers, because without effective teamwork we can't operate as a company. However, it is important to remember we are also teammates to our clients. Our success is determined by our client's success; therefore, we must always treat and respect our clients like teammates and remember that we are collaborating together to reach the same goals.

ACTION

No excuses with the client—help resolve the issue no matter where the failure occurred.

Communicate effectively how both parties can work to alleviate the situation.

UNDERSTAND THE DEFINITION OF SUCCESS

We may be the experts in the “how” and “when” of a project, but the client provides the “why.” By understanding the drivers—both positive and negative—of a project, you make sure that every effort is focused on meeting the client's definition of success.

ACTION

Ask open-ended questions and allow clients to answer in their own words. If the client knows what they want, clearly explain their options to them and then give them the freedom to choose.

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