

The Client-Centric Firm: How to Deliver the WOW Factor

By Eileen P. Monesson

Client-centric firms make service their top priority. These firms ensure that clients are at the center of a firm's vision, philosophy, and approach to delivering service. Client-centric firms believe that their clients are the only reason that they exist and use every means possible to keep clients happy and extremely satisfied.

While being client-centric is important to most firms, few are successful in delivering on client expectations. A study conducted by Bain & Company reported that 80 percent of the service providers surveyed believed that their service was superior. Even so, only 8 percent of the client participants agreed that their service provider actually delivered a superior experience.

Although 79 percent of the participants in the "Accounting Firm Client Survey," conducted in 2010 by CCH reported that they are generally satisfied with their accounting firm, a mere 17 percent indicated that they are completely satisfied with the level of service provided.

Delivering the WOW

Client-centric firms make a strategic decision to focus everything they do on their clients. They make WOWing clients a main concern of all partners and employees.

This level of service goes beyond what is expected. For example, a partner from a firm in Maryland has a client who was having triple bypass surgery. The partner went to the hospital early in the morning the day of the procedure with coffee and doughnuts for his family. He proceeded to spend the day in the hospital bringing in lunch, dinner, and other items to make the family comfortable.

An administrative assistant with a firm in New Jersey was assigned to provide support in a mediation meeting for its litigation niche. The meeting was scheduled to last approximately two hours but went on for nearly eight. The administrative assistant overheard one of the lawyers asking for advice on what to buy his seven-year-old son for his birthday, which was that day. She made a recommendation that the lawyer liked. When she noticed that the meeting was running late, she went to the store, bought the gift, wrapped it, and gave the gift with a card to the lawyer.

Although these examples might seem extreme, both made a tremendous impact on the relationship. In the first example, the client gave the partner additional work. In the second, the lawyer began to refer more cases to the firm. Both served to strengthen the relationship and generated new business.

Firms need to be authentic in their aspiration to be client-centric. While the above examples did produce revenue for the firms, this was not the original intention of the parties involved. Instead, both the partner and administrative assistant saw a genuine opportunity to WOW a client.

Becoming client-centric

Great companies that are known for delivering an exceptional service invest in developing programs to ensure that every customer receives a consistent experience with every interaction they have with that company. They do not leave anything to chance.

These companies decide what they want to be known for and develop the culture to support their vision. They define exactly how their team will deliver the desired experience and hold the team members accountable to do so. They also develop the support systems to recognize and reward employees for delivering on the firm's brand promise.

Leading by example

To be successful, senior executives and management have to buy into the program and lead by example. John Sensiba, CPA and Managing Partner of Sensiba San Filippo LLP in California (16 partners/100 employees/4 offices) is passionate about its clients, the industries in which they work, and service delivery. "Our firm is growing organically," states Elizabeth Au-Yeung, Vice President of Marketing. "We attribute our growth to having real people on our team who truly care about our clients. Our client service philosophy starts from the top—from our managing partner to the receptionist—we accept nothing less than superior service for our clients. This approach has served our firm well."

Mitchell Reno, Principal/Chief Marketing and Sales Officer shares, "At Rehmann (120 partners/700 employees/18 offices), everything we do is centered

On-Brand and Off-Brand Behaviors

On-brand behaviors could include:

- Treating each client as the firm's most important client;
- Meeting with clients on a frequent basis to get to know them, their business, industry, and challenges;
- Investing time that is not billable to build and maintain relationships;
- Communicating with clients regularly, not just in response to their questions;
- Looking out for the client's best interest by being honest with him or her, even if it means putting down an idea that the client is passionate about;
- Being willing to help a client out even if there is no immediate economic benefit;
- Returning internal and external communications promptly;
- Sending information of value to clients that they would benefit from;
- Socializing with clients;
- Greeting clients in the office;
- Expressing a genuine interest in subjects or causes that the client is concerned about;
- Supporting charitable events of importance to the client;
- Introducing clients to resources to enhance their business or personal life without regard to the benefit to the firm; or
- Acknowledging client birthdays, anniversaries, milestones, and awards.

Off-brand behaviors that need to be discontinued could be:

- Focusing the relationship on the partner-in-charge;
- Limiting client access to the manager and staff;
- Ignoring client phone calls, emails, or correspondence;
- Failing to respond in a timely manner to a client request;
- Addressing some issues, but not the important ones;
- Making commitments and then not delivering on them;
- Being unprepared for client meetings;
- Cancelling or rescheduling client meetings;
- Being late for meetings;
- Favoring certain clients;
- Giving priority to billable hours instead of what is right for the client; or
- Billing clients for services that they did not request or authorize.

on the client. Our unique method of service is modeled after how Steve Kelly, CPA, our Chairman and CEO serves clients. We wanted to emulate him throughout the firm.”

“Rehmann's brand promise, ‘Business Wisdom Delivered,’ doesn't mean we think we know it all. What it means is that we know how to listen, research, collaborate, learn from experience, and innovate to come up with comprehensive solutions to complex problems. That means we work together with each other and with our clients to develop great new ways to help people achieve their unique goals.”

“Each of us lives the promise of ‘delivering business wisdom,’” adds Kelly. “It's combining our best thinking with our clients' to develop the right solutions for their future. And, frankly, we know when we deliver on that promise—it's when our clients are totally satisfied.”

Defining client-centric behaviors

Most accountants want to be known as a trusted advisor by being relationship-driven. One suggestion is to assemble a team of professionals from every department to help define behaviors that would communicate to clients that you are relationship-driven.

The foundation of these behaviors should be based on basic communication skills: listening, questioning, probing, responding, and understanding. Using these skills, both on- and off-brand behaviors can be defined as those that are positive (WOW factor) and those that are negative (see sidebar: On-Brand and Off-Brand Behaviors).

Client Ambassadors are at the heart of The Rehmann Experience. Every client is assigned an ambassador to ensure that Rehmann exceeds expectations. “The Client Ambassador is instrumental to the success of our program,” continues Reno. “Client Ambassadors are not a member of the service team. He or she is an independent advocate for the client. Client Ambassadors are in-touch with the clients they are assigned to throughout the year. They meet with clients to discuss the level of service they are receiving. Rehmann developed interview questions for each Client Ambassador to ask during these meetings. We want to ensure that the process is consistent.”

Ted Davidson, AVA and Chief Experience Officer with SPARData Value Advisors (3 partners, 10 employees/1 office) in Maryland has a different approach to client service. “We value bill to ensure that our clients receive what they want. We offer three service levels—Bronze, Silver, and Gold. Clients know what to expect at the beginning of each engagement. We set our standards on value delivered to the client instead of billable hours.”

Generational Wealth Partners (4 partners/3 employees, 35 independent representatives/1 office) in Washington educates its clients. “We find it important to educate clients on cash flow and investing,” adds Rich Keal, Principal. “We give clients access to the Profit Mastery program. We want clients to know as much as possible about financial principles. We WOW our clients by being truthful with them.”

Training is key to becoming a client-centric firm

Employees need to know exactly how to deliver exceptional service. Rehmann trains new employees on how to turn the firm’s values into behaviors. The firm developed the Rehmann Academy to train employees on how to deliver its service standards and 50 ways to WOW clients.

“We invest in training employees on how to deliver exceptional service to our clients. The firm celebrates our commitment to clients each week with WOWem Wednesdays,” states Reno. “Employees receive suggestions on how to WOW clients. We try to make the program fun, but tactical. In addition, client service teams meet three times after each engagement to ensure that the client received The Rehmann Experience. During these meetings, the client service team reviews what was accomplished, how they did it, as well as what could be improved. Client Ambassadors interview the client to gain insight. A client service plan is then prepared to enhance near- and long-term deliverables.”

Ryan Sharkey (5 partners/42 employees/1 office) in Virginia has a formal on-boarding program for new employees. They attend sessions to learn everything about the firm’s clients from the company culture to its challenges, industry trends, and the services the firm provides. “We train employees on our core values, how to interact with clients, as well as how to dress and be a professional. We take a holistic approach to client service. Training is reinforced on the job. Employee behaviors are defined in job descriptions. New employees are evaluated 90 days after joining the firm to ensure that they understand our service model,” states P.J. War-

wick, CPA, and partner. “We hold ‘All Hands’ meetings monthly to discuss client experiences. We spotlight one client and ask team members for suggestions on how to deliver an even higher level of service. We go beyond the technical aspects of the engagement.”

Recognizing employees for living the brand

“Employees are rewarded for delivering The Rehmann Experience. We have a program to recognize employees that live the Rehmann brand. Employees can report behaviors that they either witnessed or experienced. Certificates are immediately available for employees to print and display in their workspace. They are also held accountable for doing so in their employee evaluation.”

Sensiba San Filippo also has an employee recognition program called “Go to Market.” This 90-day program acknowledges its team for providing superior service. Employees earn points from client and coworker feedback. At the end of each period, the employee that has earned the most points wins a valuable prize, such as an iPad.

Expected results

Client-centric firms differentiate themselves on the performance of their people. Rehmann added a fifth “P” to the four principles of marketing (*i.e.*, product, place, promotion, and price)—people. In a performance-driven work culture, the staff understands the firm’s strategy, embraces it, and has the skills and desire to execute it.

Implementing a client-centric program will strengthen relationships, enhance client and employee satisfaction, increase accountability, and drive bottom-line results.


As a result of its OneRehmann program, client satisfaction has increased. “We survey clients every other year. Ninety-seven percent report that they are either satisfied or totally satisfied. The happiness of our clients is important to everyone at Rehmann,” adds Reno.

Sensiba San Filippo reports the highest client retention rate of any firm in Northern California. “Many clients have been with us for 30 years,” claims Au-Yeung. “This is a testament that our client-centric approach is working.”

RainToday.com reported in “How Clients Buy: 2009 Benchmark Report on Professional Services Marketing & Selling from the Client Perspective” that 79 percent of buyers identify and learn about service providers by referrals from colleagues. Happy clients make referrals. Being a client-centric firm will help by focusing on the client/service provider relationship.

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