Sample
Client Feedback
Report Overview

CUSTOMER FOLLOW UP, Inc.
...keeping you on course.

A Client Service Assessment & Improvement Firm
ESTABLISHED 1997

SAMPLE REPORT OVERVIEW

*Due to the confidential nature of the feedback obtained by **Customer Follow Up, Inc**. all comments contained in the sample report are fictitious. The following shows elements of a typical CFU summary report.*

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EXECUTIVE SUMMARY

PROJECT MANAGEMENT
There are many indications that FF does exceptional technical work and meets the needs of many of their clients. This is in keeping with FF's stated mission and marketing materials that tout a commitment to high quality work and exceptional client service. However, the data also suggests that FF is not *consistently* living up to the client service ideals the firm aspires to.

Many FF projects go extremely well both in terms of the quality of the finished product and the experience working with FF. Andrew Peters of HR Hoffman Surgical echoed what many other clients said about working with FF, "FF provides excellent client service and they are always concerned about our needs."

Conversely, when FF loses focus and takes their eye off ensuring client's needs are met, it is costly. In fact, in one case it cost FF 3-4 million dollars in lost revenue because they did not receive the contract for the second phase of Kiefer Consultant's JMX Plant Facility. Factors like ineffective issue resolution, missed deadlines and changing project managers mid-project without forewarning clients have created a loss in confidence for some clients. Clients then look to other firms for a more professional approach to managing their projects.

It is worth noting that the reasons clients became disillusioned with FF were generally not based on the technical skills of the firm. In fact, seldom did clients convey negative experiences concerning the technical aspects of FF's work. Since many firms offer the same services that FF does, it is imperative that FF sets itself apart from the competition by providing consistently strong and effective client service.

POSITIVE ELEMENTS OF CLIENT SERVICE
A closer examination of the feedback reveals several key elements common in all of the projects that went well. The following elements were common across all FF projects that flourished.

- FF met with the client before the project began to learn what the client's expectations were in regard to the preferred frequency and method of on-going contact.
- Calls and emails were returned within the same day, even when the PM did not have an answer to the client's question(s).
- FF provided regular communication, especially when there was a change in the project management staff.
- FF provided appropriate issue resolution.
- FF conveyed, both in attitude and action, that the successful development of the project was important to them.

REGIONAL DIFFERENCES
There was no indication that deficiencies in client service were isolated to any particular regional office. Across all regions there were projects that went well and some that did not go as well. What was apparent is that FF does not have a centralized way by which to track service trends and to track whether issues were resolved to the client's satisfaction, and if not, the impact of not resolving those issues.

CLIENT RELATIONS
FF's projects that result in strong client relations generally have one element in common – a project manager that keeps the client in the loop, is engaged in the process and that communicates well. For the project manager to be this effective they must have a cohesive team and the infrastructure behind them to provide the tools needed to serve clients' needs.

REWARDS OF EFFECTIVE PROJECT MANAGEMENT

Client: Chapel University
Project: Marina Renovation (Phase I)
Reward: **Granted Phase II of project**
Issues: Project manager was engaged and proactive in resolving issues. He ensured that the right people were on the project and he kept them on task.   Client particularly appreciated the project's key management team suggesting they attend what could have been a contentious local city council meeting. Their presence allayed any concerns the officials had with the possible negative impact on the community of expanding the marina.   On-going efforts from the project team were instrumental in the relatively smooth flow of the project.

Client: CityScape, Inc.
Project: Stadium Expansion - Design Phase
Reward: **Granted construction management of project**
Issues: CityScape said that FF demonstrated their prowess in thinking out of the box with several innovative design ideas. And, FF conveyed that this was a very important project to them and that CityScape's interests were paramount. It was evident to CityScape that FF is an organized team of professionals.

COSTS OF INEFFECTIVE PROJECT MANAGEMENT
FF's infrastructure, in its present state, is not consistently supporting strong and effective project management.

Client: Kiefer Consultants
Project: JMX Plant Facility
Lost Revenue: **3-4 million dollars**
Issues: The project was in peril from the start. At the 50% interview, major issues were uncovered, and at the 100% interview it was clear that FF took no definitive action to remedy earlier issues.   FF used inadequate hand-off procedures for a new project manager who came on board mid-project and they missed deadlines. "It is a shame FF lost this $3-$4 million job and any foreseeable work due to the way this project went."
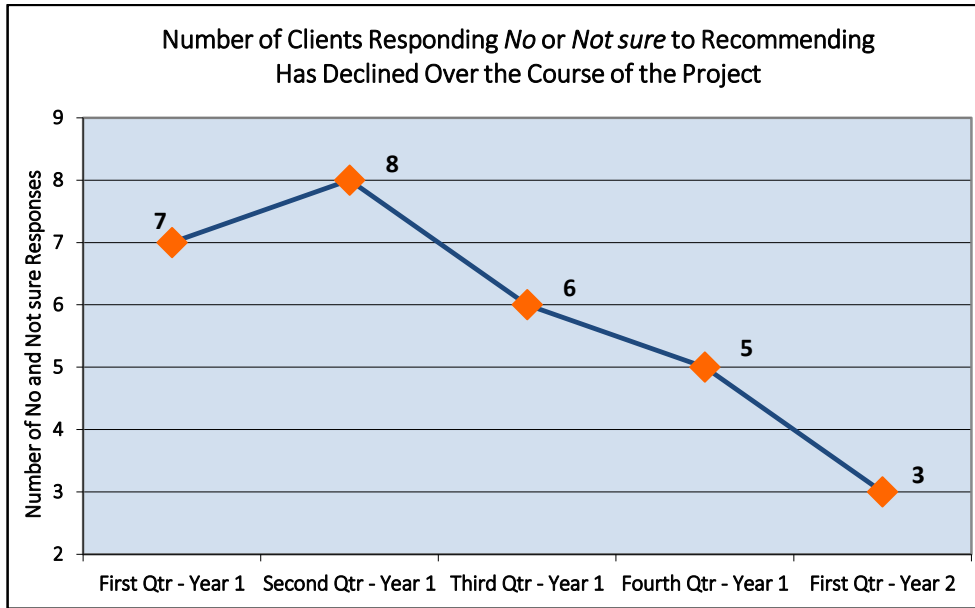
Client: Hopkins, Inc.
Project: Design/Build
Lost Revenue: **Undisclosed**
Issues: Client discovered early in the project that FF overlooked several important design features and they were unusually slow to complete the design as specified. "FF was an absolute shoe-in for the build side of the project, but the design missteps caused us to look elsewhere."

Client: Palmer Partnership
Project: Design
Lost Revenue: **Undisclosed**
Issues: FF did not respond to repeated requests for more frequent project updates and timelier responses to questions. "We wanted to involve FF in the construction phase of the project, but we've lost confidence in their project management abilities."
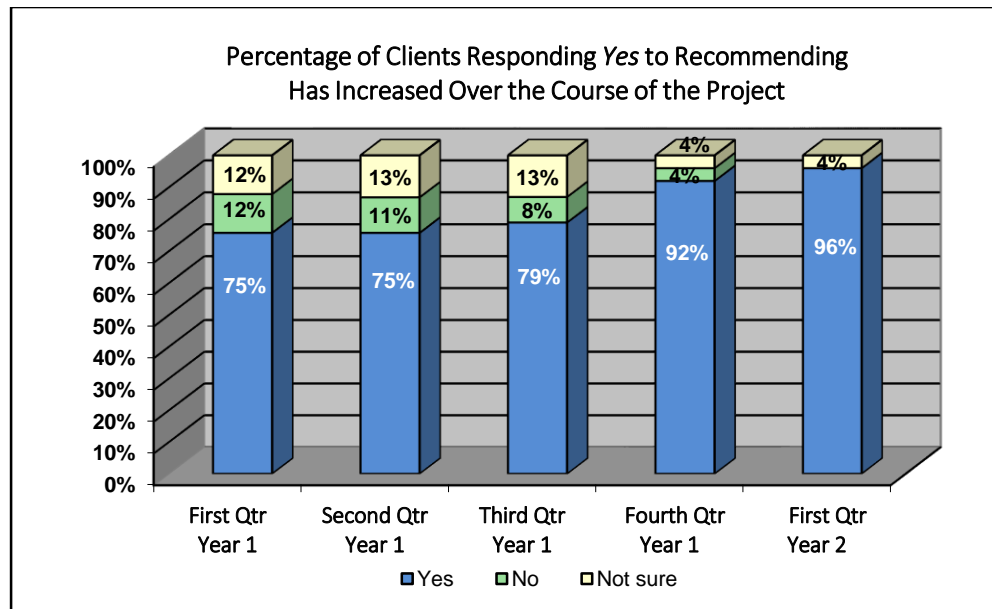
CLIENT RETENTION

At the beginning of this project the trend for FF referrals was in decline. However, as the year progressed and FF made improvements to their client service, referrals did increase in the fourth quarter of Year 1 and the first quarter of Year 2.   The challenge for FF now is to maintain this upward trend.

NO OR NOT SURE RESPONSES TO RECOMMEND QUESTION

Number of Clients Responding *No* or *Not sure* to Recommending Has Declined Over the Course of the Project

Number of No and Not sure Responses

Quarter	Value
First Qtr - Year 1	7
Second Qtr - Year 1	8
Third Qtr - Year 1	6
Fourth Qtr - Year 1	5
First Qtr - Year 2	3

OVERALL RESPONSES TO RECOMMEND QUESTION

Percentage of Clients Responding *Yes* to Recommending Has Increased Over the Course of the Project

	Yes	No	Not sure
First Qtr Year 1	75%	12%	12%
Second Qtr Year 1	75%	11%	13%
Third Qtr Year 1	79%	8%	13%
Fourth Qtr Year 1	92%	4%	4%
First Qtr Year 2	96%		4%

CALLS TO ACTION

1) Clients place high value on their positive working relationships with the FF and, in particular, appreciate FF for:

- Outstanding verbal and written communication
- Great attention to detail
- Consideration of the client's best interests
- Responsiveness to time sensitive issues
- Excellent value for the cost
- Top-notch technical expertise

  ➢ **Recognize staff for their persistent efforts to provide clients with an outstanding experience and high quality work.**

2) Suggested area of improvement - *Project management*:
- FF was late with their deliverables; this may impact some funding. FF indicated that an increased workload impacted their timeliness.
- Some of the technical items could have been addressed more thoroughly. FF missed the motor HP sizes and didn't document fire protection work.
- Overall, FF managed the project well, but their time management towards the end was not as good as it could have been. Their deliverable wasn't at the level it should have been at the deadline, with some omissions and incompleteness. FF did made the appropriate corrections.

  ➢ **Determine how to avoid issues with the timeliness of deliverables.**

  ➢ **Determine what led to clients' dissatisfaction with the completeness of submissions. Were they miscommunications about expectations (in a project kick-off meeting or otherwise) or oversights by the project team(s)?**

3) Suggested area of improvement - *Work quality*:
- The contact would have preferred to have more details in the documents provided by FF.
- The client downgraded FF's quality (to 8 rating) because they missed motor HP sizes and didn't document fire protection work.

  ➢ **Determine what led to clients' dissatisfaction with the completeness of submissions. Were they miscommunications about expectations (in a project kick-off meeting or otherwise) or oversights by the project team(s)?**

4) Suggested area of improvement - *Problem solving*:
- Because FF requested a time extension, the client considered that they were adequate with problem solving, but not great.

  ➢ **Going forward, is there a way to avoid similar deadline extensions or does the client need to be made aware of the reason for the extension?**

5) Suggested area of improvement - *Value*:
   - The client thought FF's deliverable was appropriate but priced too high. (6 rating)
   - FF is in the middle of the pack as far as value. They are reactive and do what is asked of them. Without expertise in pavement engineering, it is challenging to be proactive to the point of anticipating the client's needs. They are getting there, though. (7 rating)

   ➢ Consider explaining the project fee justification to improve the client's perception of the fee.

   ➢ Will FF miss out on future pavement engineering projects without having more expertise in-house?

6) Additional Concerns:
   - The contact would prefer that the FF staff he works with be more seasoned. Though he appreciates the talent and energy the relatively young team exhibits, he hopes they are experienced enough to ensure everything is being considered to best meet the project's goals. He assumes they are being mentored by senior staff at FF.

   ➢ If applicable, reassure the client of FF's senior staff oversight and the mentoring process related to his project.

RESPONSES TO RECOMMEND QUESTION – by REGIONAL OFFICE
Comparing Responses to Projects 50% Complete to Projects 100% Complete

FIRST QUARTER – YEAR 2

Regional Office	CA	FL	MA	NC	NJ	NY
Survey Type # of Interviews	50%/100% 7 / 9	50%/100% 6 / 3	50%/100% 3 / 2	50%/100% 4 / 3	50%/100% 8 / 5	50%/100% 6 / 7
50% Survey Would recommend	Yes – 100% No – 0% NS – 0%	Yes – 100% No – 0% NS – 0%	Yes – 77% No – 0% NS – 33%	Yes – 100% No – 0% NS – 0%	Yes – 80% No – 10% NS – 10%	Yes – 85% No – 9% NS – 6%
100% Survey Would recommend	Yes – 93% No – 13% NS – 0%	Yes – 100% No – 0% NS – 0%	Yes – 96% No – 14% NS – 0%	Yes – 89% No – 11% NS – 0%	Yes – 90% No – 20% NS – 10%	Yes – 100% No – 0% NS – 0%

YEAR-TO-DATE CUMULATIVE RESPONSE COMPARISON
<25%, 50% AND 100% PROJECT COMPLETE INTERVIEWS

Number of Clients Interviewed	21	24	77	122
Interview Type	<25%	50%	100%	Averages
Expectations – Budget	NA*	Exceeded – 0% Met – 62% Not met – 24% Not sure – 14%	Exceeded – 6% Met – 69% Not met – 21% Not sure – 4%	Exceeded – 4% Met – 67% Not met – 22% Not sure – 7%
Expectations – Quality of work	Exceeded – 28% Met – 72% Not met –0% Not sure – 0%	Exceeded – 22% Met – 61% Not met – 17% Not sure – 0%	Exceeded – 29% Met – 59% Not met – 11% Not sure – 1%	Exceeded – 26% Met – 60% Not met – 13% Not sure – 1%
Expectations – Client service	Exceeded – 25% Met – 75% Not met – 0%	Exceeded – 26% Met – 64% Not met – 9%	Exceeded – 28% Met – 66% Not met – 6%	Exceeded – 26% Met – 57% Not met – 17%
Rating - PM (1-5 scale)	3.8	3.7	4.1	3.9
Rating – Problem resolution	4.0	3.8	4.2	3.8
Rating – Technical competency	4.3	4.3	4.5	4.1
Expect goals to be met	NA	Yes – 86% No – 0% Not sure – 14%	NA	Yes – 86% No – 0% Not sure – 14%
Would make same decision again	NA	Yes – 80% No – 4% Not sure – 16%	Yes – 87% No – 9% Not sure – 4%	Yes – 85% No – 7% Not sure – 8%
Would recommend	NA	Yes – 83% No – 4% Not sure – 13%	Yes – 86% No – 6% Not sure – 8%	Yes – 85% No – 5% Not sure – 10%
Strength of recommendation	NA	Strong – 79% Moderate – 21% W/reserv. – 0%	Strong – 83% Moderate – 15% W/reserv. – 2%	Strong – 82% Moderate – 17% W/reserv. – 1%

* NA – Question not asked in interview type.

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