USA

Client Care
Giving and Receiving Feedback

Client Care Leaders and Teams

Handbook

Introduction

Asking our clients what they think, and really listening to what they say, is one of the easiest ways to demonstrate our commitment to being a client-centric organisation.

Being client-centric is about putting ourselves in our client's shoes, understanding their needs, being responsive to those needs and delivering what we say we will deliver.

So how do we know if we've got it right? The best way is to ask! Doing this regularly gives us a great perspective from which to make continuous improvements or add those personal touches that matter.

Clients come to WSP because of our reputation, track record and expertise. What it's like working with us, and how closely the client's experience aligns with their expectations, is what will keep clients coming back. When we ask for feedback, we set aside our own assumptions about how things are going and show we are willing to see things from someone else's perspective.

We aim to become the best in our industry – setting the 'gold standard' of client experience. Being client-centric is ultimately about putting ourselves into the clients' shoes: understanding their needs, being responsive to those needs and then delivering on what we say we are going to. To become the best, we must understand and respond to client needs better than the competition, and work hard to develop long-term and trusted relationships. Capturing, analysing and responding to feedback are a fundamental part of achieving this objective.

This guide helps you develop a feedback plan for your key account, discusses how best to ask for (and receive) feedback, and introduces WSP's feedback tools and resources.

SECTION 1

Positioning feedback as a key component of Client Experience

Why Feedback?

Feedback offers us so many benefits! It helps us identify areas for continued improvement, uncover emerging issues early, highlight new opportunities, shape future business strategy, and acknowledge great performance by our teams. In addition, our business external certification requires us to ensure that the client's perspective is proactively monitored and managed.

1. **Learn as we go**
   The only way we can improve is to learn from our experiences. Feedback allows us to do this on a project level; when we share our lessons learned with others, we improve as a team and an organisation. The activity is part of creating a learning culture and driving a Continuous Improvement mindset.

2. **Build connection**
   Asking for feedback shows the other person that we are interested in their experience and invested in what matters to them. Listening well and making an effort to empathise – seeing things from the other person's perspective – encourages honest conversations. It's also a way of getting to know the other person better, and builds the trust and connection that contributes to long-term strategic relationships.

3. **Open up opportunities**
   The best way to win work is to deliver a positive client experience that creates repeat business. Asking for feedback can also open up conversations about about client drivers or challenges and future opportunities.

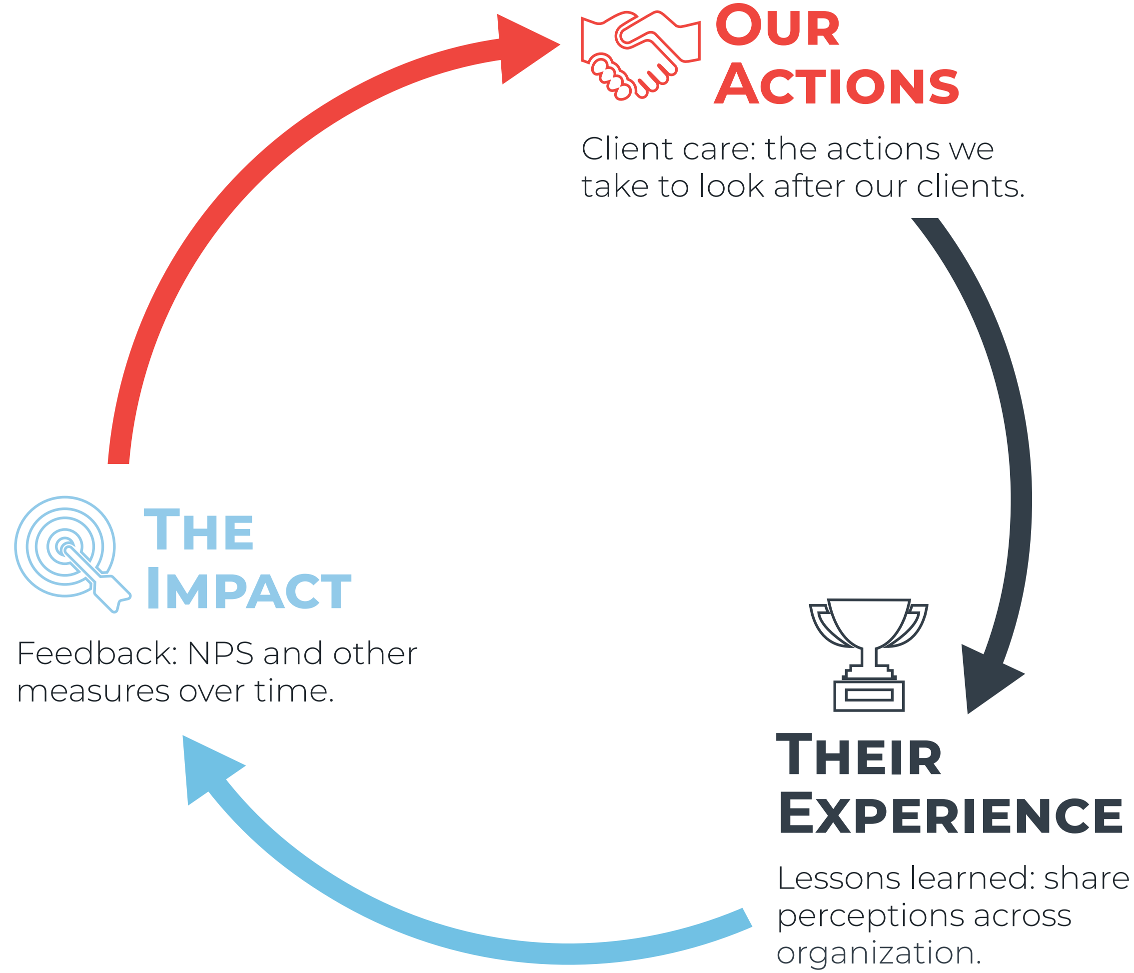
4. **Celebrate success!**
   We all want to be on a winning team. Recognising individual and team effort by sharing positive feedback increases engagement and purpose among project teams, boosts positivity, and also gives us great collateral for future bids.

Feedback and the bigger picture

The result of what we put in

Feedback is a real measure of our clients' experience throughout the project lifecycle, as shaped by our individual and team actions: the result of what we put in.

This model describes how our individual interactions add up to create a client's overall impression of us (known as the Client Experience). When we ask for feedback, we're checking how well we're doing at delivering a great experience: the impact of those actions over time. It also provides us with lessons learned that can be shared across disciplines and with the wider organisation.



When to ask for feedback

Throughout the client journey

The client journey includes all of the important interactions between the client and WSP, from the initial query and project award, through to their experience of project delivery and the completion of the project. These interactions include direct contact (immediate project delivery teams), and indirect contact (for example, the invoicing team).

Over time, all those individual interactions along the journey add up to create an overall impression, which is known as the client experience. Each interaction with WSP is an opportunity to create a positive impression (helping the client continue their journey) or a less-than-positive impression (the journey could stop).

Being client-centric is about looking out for these opportunities and risks, and managing them well. Using their knowledge of the client journey and the moments that matter most to the client, Client Care Leads (CCL) should work with the CCL and project delivery teams to ensure that feedback is gathered at multiple points along the client journey (not just at project close).

By doing so, we can understand how well the client's experience matches their expectations, and identify where expectations may have changed. Where we've got it right and have positive feedback, we can keep doing these activities; should things not be quite right, we have time to adjust along the way (and improve the client's experience).

Who to ask for feedback

From different perspectives

Feedback planning should reflect the different stakeholders in the client organisation: project delivery teams, procurement leads, and senior decision makers. Collecting feedback at different levels and in different ways allows us to build a complete picture of the client's experience across individual touchpoints and at a project, account and organisational level, and assists in strengthening relationships across the client's organisation.

In the U.S., it is the responsibility of the Client Care Leader to discuss with the Regions and National Business Lines who client feedback should be obtained from, and who is the best WSP contact to conduct this important feedback discussion.

The feedback methods in WSP's Client Feedback program (Section 4) will help you to do this at different levels of the account.

Rather than assume we understand clients' perception of the experience, why not just ask?

SECTION 2

Feedback best practice and top tips

Putting ourselves in our clients' shoes

Dial up the empathy

The most important component of feedback is empathy – the ability to put ourselves in our clients' shoes and understand their experience and how they feel about our performance. This emotional connection is key to delivering a consistently excellent client experience that can be grown into a long-term trusted relationship.

It takes courage (and time) to ask for feedback. Aside from formal feedback methods, it's a great idea to check in with your client informally – give them a call (depending on their preferred way of communicating) or keep a running line on your meetings in which you ask – 'how do you feel we're doing on this project?' and 'is there anything you feel we could improve on or provide you with?'

This can be a great way to uncover expectations around communications, added value ideas, or even further growth or cross-selling opportunities.

It's understandable to be nervous when asking for constructive feedback, particularly if the response indicates opportunity for improvement. That said, not knowing if there's an issue is even worse. By providing feedback, the client is giving us the opportunity to positively respond and address any concerns.

Types of feedback

We often describe feedback as ‘positive’ or ‘negative’ but instead of framing feedback in this binary way, consider all feedback as contributing to learning and continuous improvement. Feedback can be divided into two categories.

Motivational

Encouragement for what is going well

Motivational feedback not only pinpoints great performance, but also indicates why something has gone well. When asking a client for feedback, always ask what they value about our work, including WSP’s performance overall or of individual staff. Positive feedback questions reinforce our value to the client, and should be shared with the team as motivational feedback.

Continuous Improvement

Advice for improvement moving forward

Constructive feedback doesn’t have to be a humbling experience, and research shows that when people feel safe when giving or receiving difficult feedback the relationship is strengthened by the opened exchange and problems are resolved more quickly. Always be a thoughtful listener with your client and ask appropriate follow-up questions to demonstrate your willingness to learn from their comments and take corrective actions. This type of open and constructive dialogue will strengthen the relationship and show your commitment to a better client experience.

Principles of feedback

These principles of feedback apply to any kind of conversations, whether internally and amongst team members or with external clients and suppliers. While we can't control the nature of the feedback we receive from clients, we do have ownership over how we cascade the feedback to the individuals who need to receive it and respond. Feedback should always be:

01 For the benefit of the recipient

It's never wise to push back on a client's feedback, or to vent our own feelings. When we receive feedback it should be to benefit the client, and give them an open communication channel to express their perceptions, whether positive and negative.

02 Current and relevant

It's frustrating to receive feedback too late to act on, or to be kept guessing as to how we did. Feedback is most useful in achieving its aims when it is received on a timely basis, allowing both you and the client to set expectations for timely follow-up. Ask for feedback regularly to ensure that all comments reflect current events and allow for immediate corrective action as needed.

03 Actionable and specific

To have impact, feedback should be specific enough so that it can be acted upon. Think about learning to drive – if you are told 'very good', regardless of what or how you do, you'd never know what good looks like or how to pass the standard. By the same token, if you are always told that you are driving terribly, you won't know what to fix unless you are provided with specific actions to improve. Make sure you ask detailed, open-ended questions to better understand the client's perceptions.

04 Balanced and regular

In order for us to create a culture of feedback, feedback should be both developmental and motivational in nature and occur on a regular basis. Feedback discussions shouldn't feel like a big deal or special occasion, but an everyday part of working together (with each other and with our clients). Strong communications are the foundation of any positive, long-lasting relationship.

Create a feedback culture

How do you create an environment that encourages feedback?

- Make a habit of asking open-ended questions
- Welcome feedback with a positive attitude (even if you don't agree)
- Respond promptly, resolving concerns

How do you ask for informal feedback during a meeting?

- How is the project going?
- How can we better understand your needs?
- What could we be doing better?

Feedback on the go

The ‘you, me, agree’ model can be applied in most situations.

YOU

First, invite the other person to share their view and perspective using one of the following questions:

— *Tell me more about...*
— *I’m curious about...*
— *I’m wondering...*
— *Help me understand...*
— *Walk me through...*

ME

Now that the other person feels heard, use one of these statements to share your perspective:

— *The way I understood it was...*
— *It would be more effective if we...*
— *I think it works really well that we...*

Examples can help you to describe specific effects. Don’t worry if there are moments of silence, as you both digest and think through the conversation.

AGREE

Once both parties’ perspectives have been heard, you can problem-solve together.

— *Let’s agree on how this might be best resolved...*
— *What ideas do you have for...*

SECTION 3

How to receive and respond to feedback

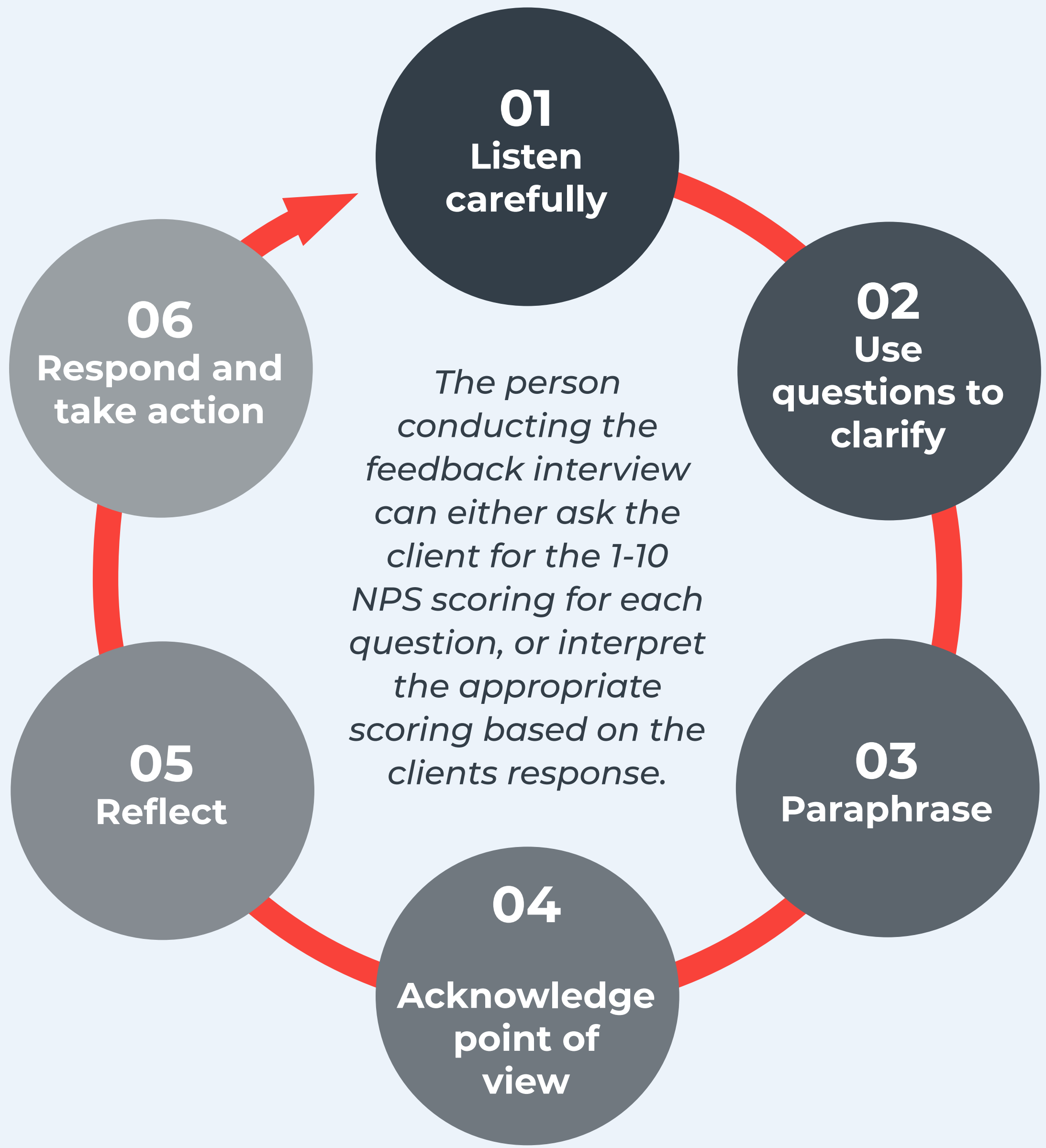
Feedback model

The key to receiving feedback is to listen carefully and ensure that we've heard what the client is trying to tell us, before responding or actioning a solution.

Explore these six steps in the feedback model shown.

1. Listen carefully without interrupting or becoming defensive.
2. Thank the client for providing feedback and ask to clarify if anything is unclear.
3. Paraphrase ('reverse brief') what the speaker has said to check you've understood their meaning.
4. Acknowledge the speaker's point of view (even if you don't agree with it).
5. Reflect as an individual and with your team: What happened? How did it happen? What have you learnt from it?
6. Respond and action as appropriate, communicating appropriately so that the client feels reassured by how their concerns have been handled.

While we can choose what feedback to take on board, we must first ensure that the client feels heard and understood.



01 - Listen carefully

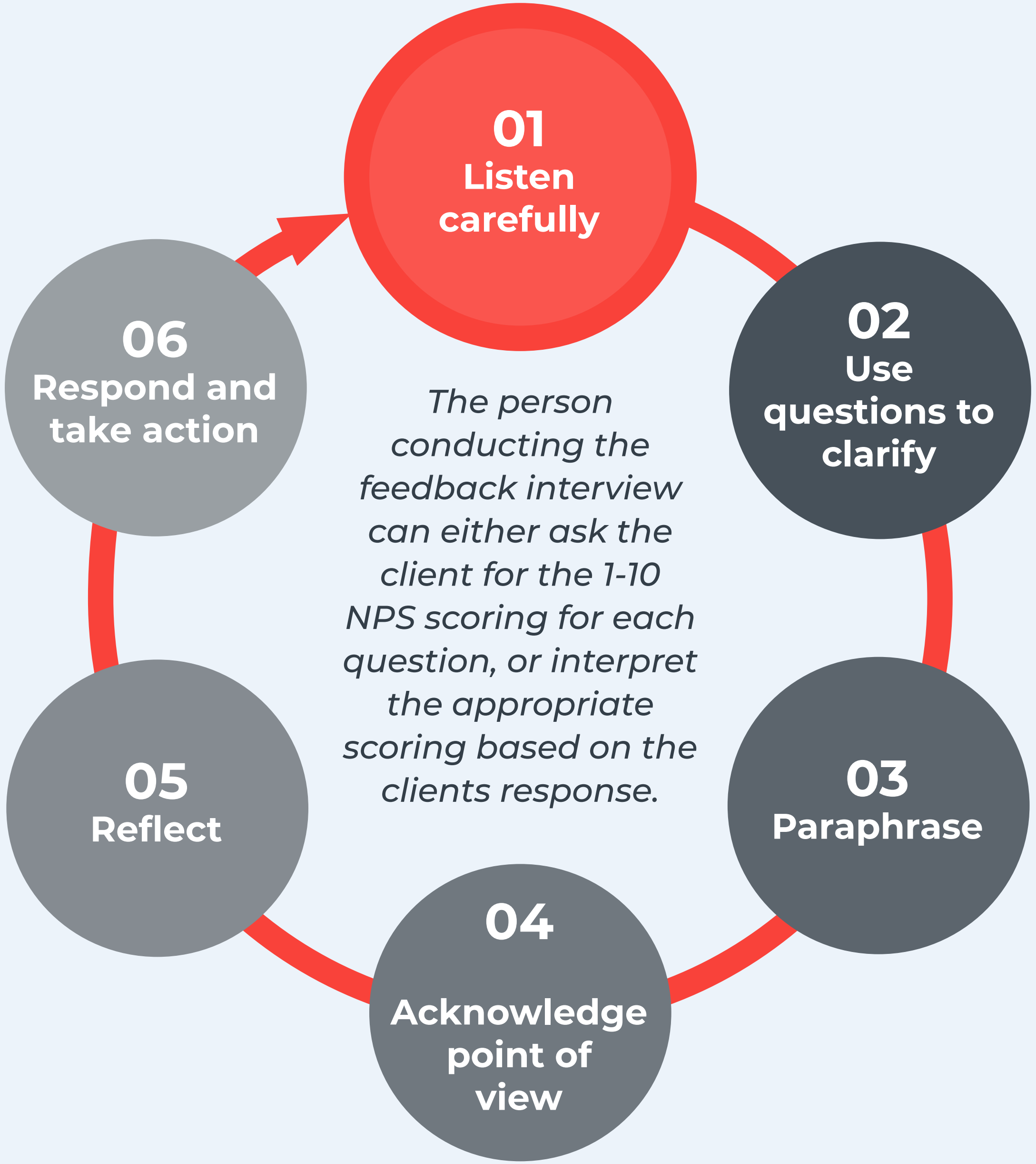
We all think we listen well, but listening properly takes effort, and time, and attention.

In the four layers of listening the first is **ignoring**, which is uncommon (in the workplace, at any rate!). The second is **pretending**, something we do when we are nodding along but not really absorbing what's being said.

Most commonly is **selective** listening – listening for what we want to hear, or for what confirms our own bias or assumptions.

Attentive listening is difficult – it means listening without any judgement or assumptions or thinking of what to say back or next. It means practicing curiosity even when (or especially when!) we disagree or think we know better.

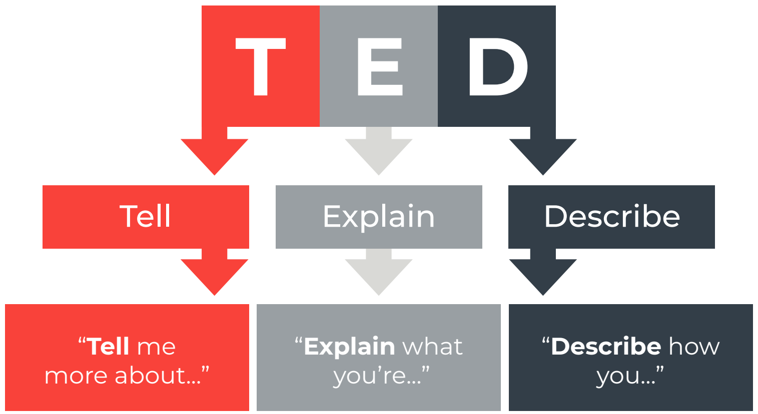
Being heard is a basic human need and creates a feeling of trust and safety. It's also something we need to do equally well with all clients and colleagues, to ensure we are being inclusive of different styles and diversity of thought.



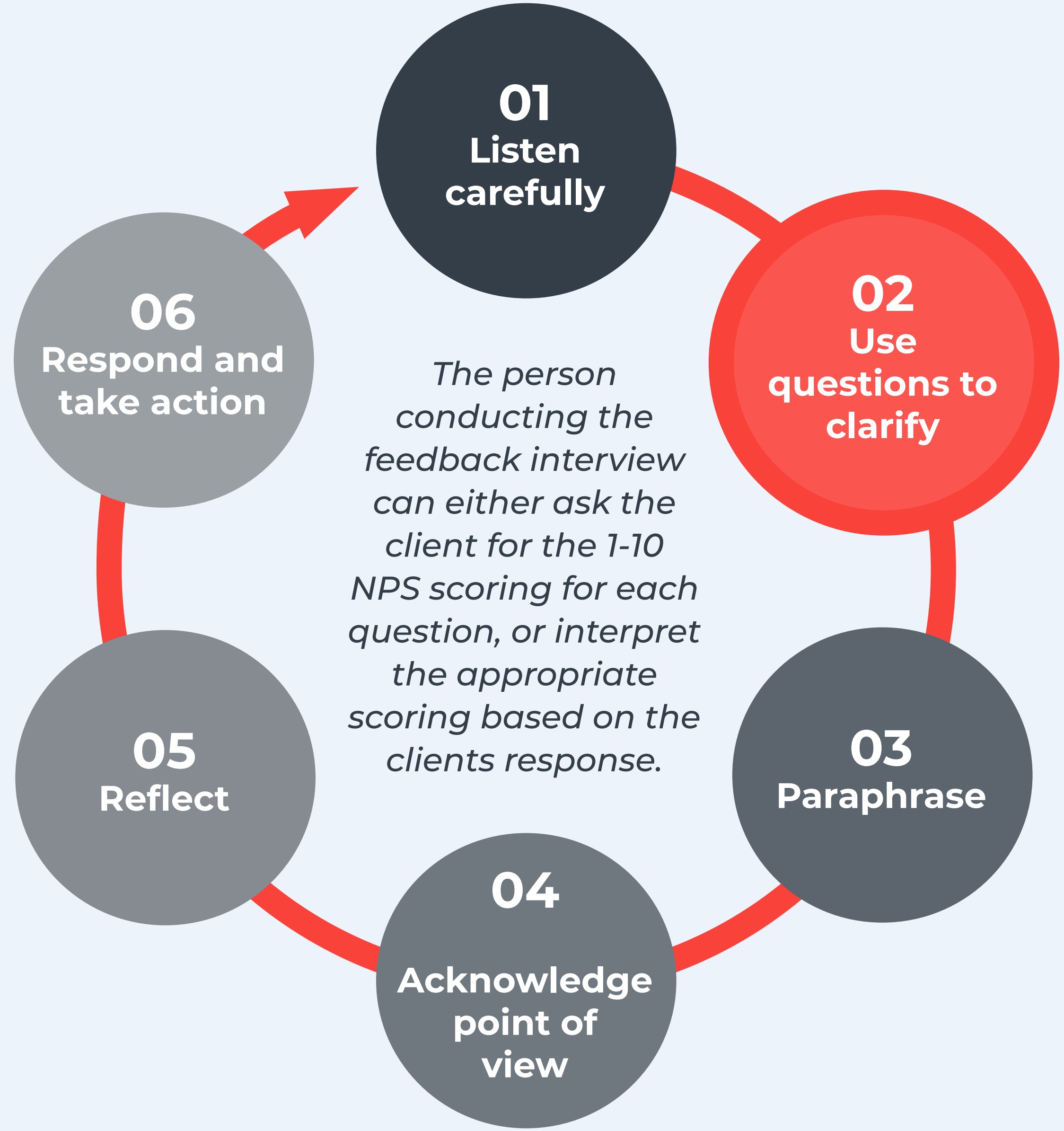
02 - Use questions to clarify

Thank the client for providing feedback and raising their concern. Then dig deeper.

To clarify anything you're unsure about, use open questions starting with 'what, why, where, who, and how', or keep TED in your head:



While we think we may understand everything a client thinks, feels or says, asking further open-ended questions shows that we care about uncovering the client's underlying needs and concerns.



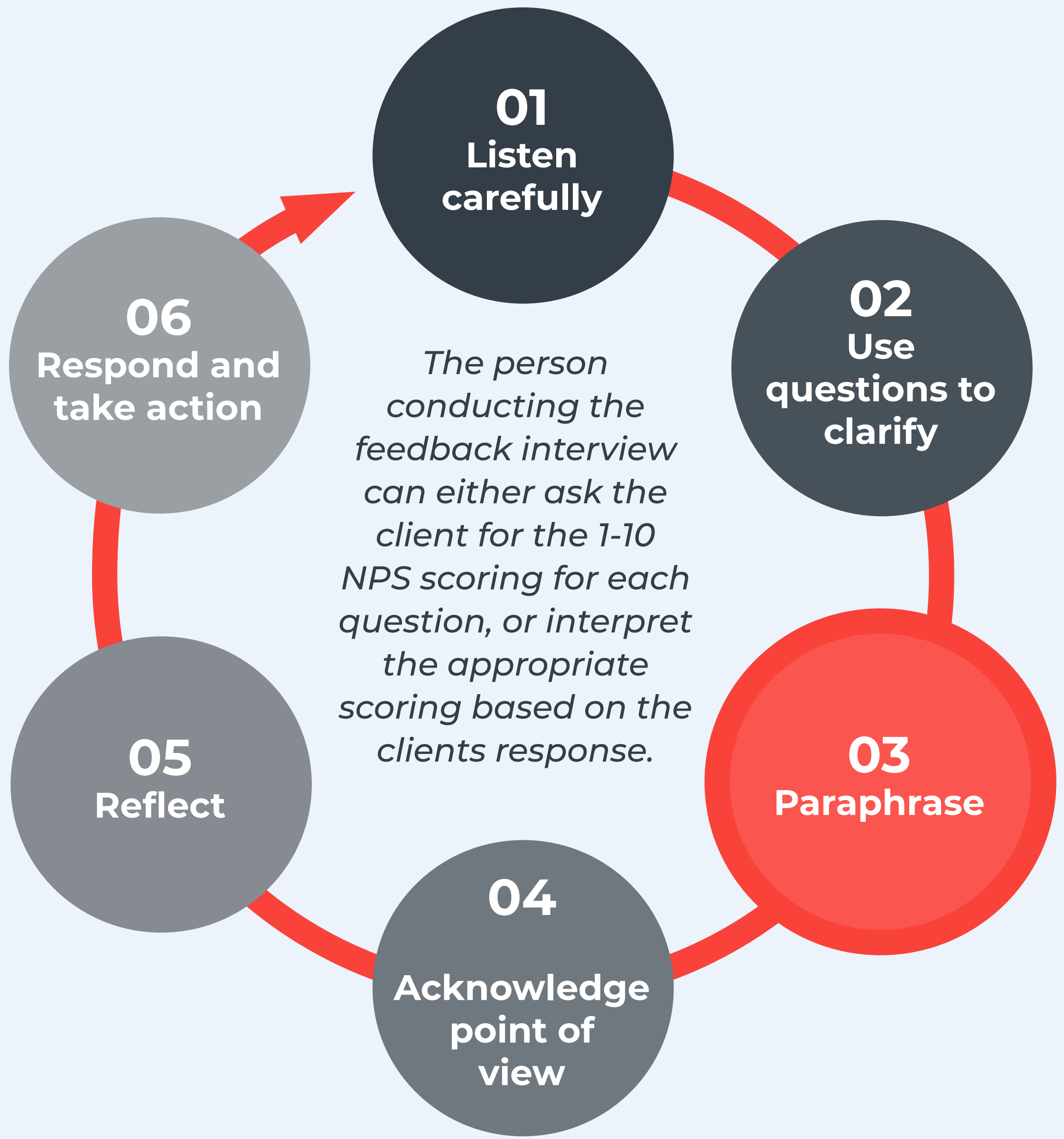
03 - Paraphrase to confirm

Also called a reverse brief, summarizing or tentatively reflecting back what the client has said provides the reassurance that you take their concerns seriously and provides them with the opportunity to correct our understanding if it's not quite right.

Where conversations have been tense or contained heightened emotion, this also serves to cool down the temperature.

Useful phrases to do this will include:

1. *'If I can play that back to ensure I have it correct...'*
2. *'From what you told me it sounds like...'*
3. *'Would it be correct to say that...?'*



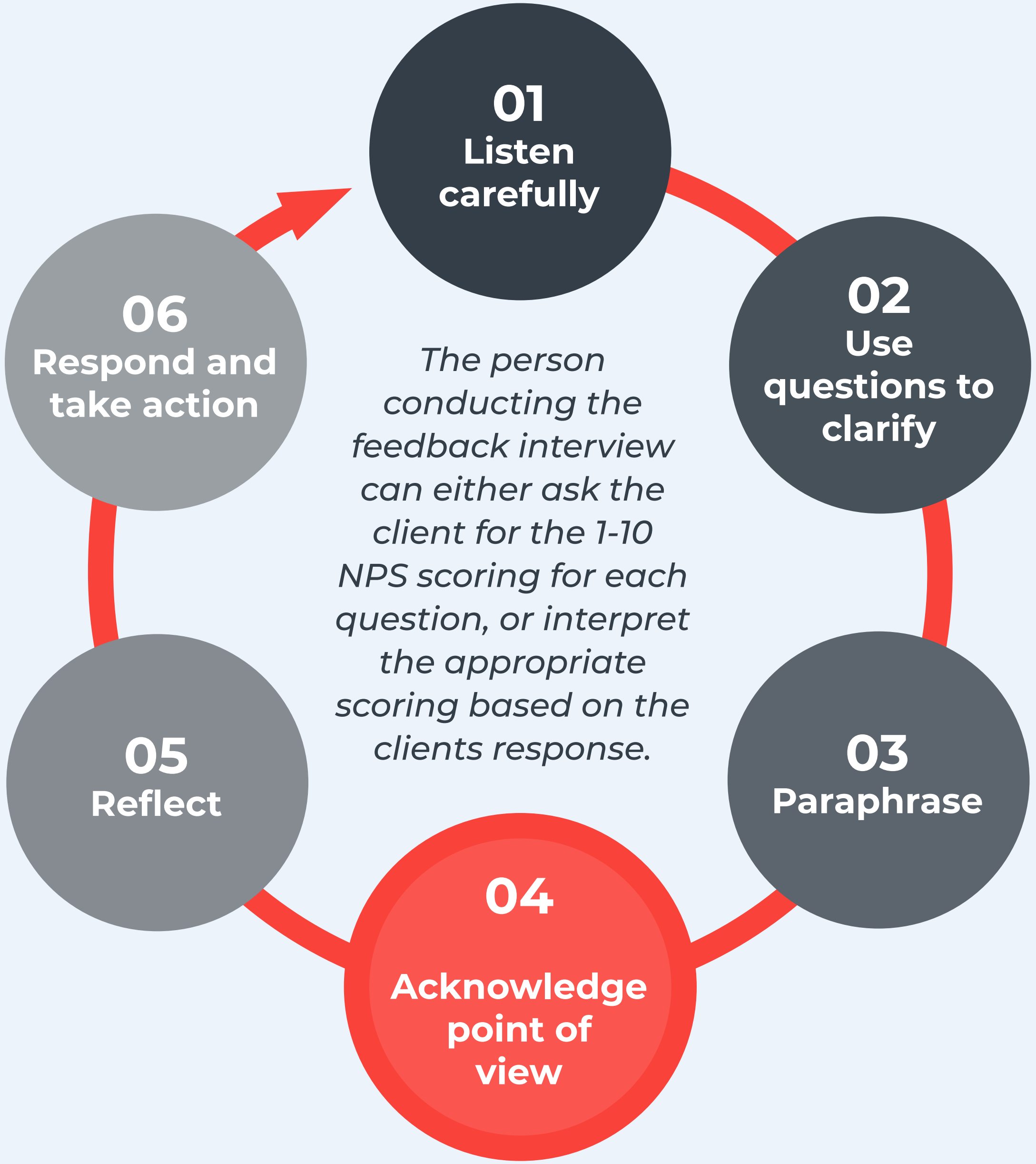
04 - Acknowledge point of view

Acknowledging the client's point of view does not necessarily mean agreeing with everything they said.

Remember that you can choose what feedback you want to take on board or make use of, but we always need to make the client feel heard and understood.

Despite what it may feel like, feedback is a gift – wouldn't you rather know?

The worst feedback is silence. Knowing what a client *really* thinks is a good thing – by telling you, they are providing an opportunity for you to fix the problem.



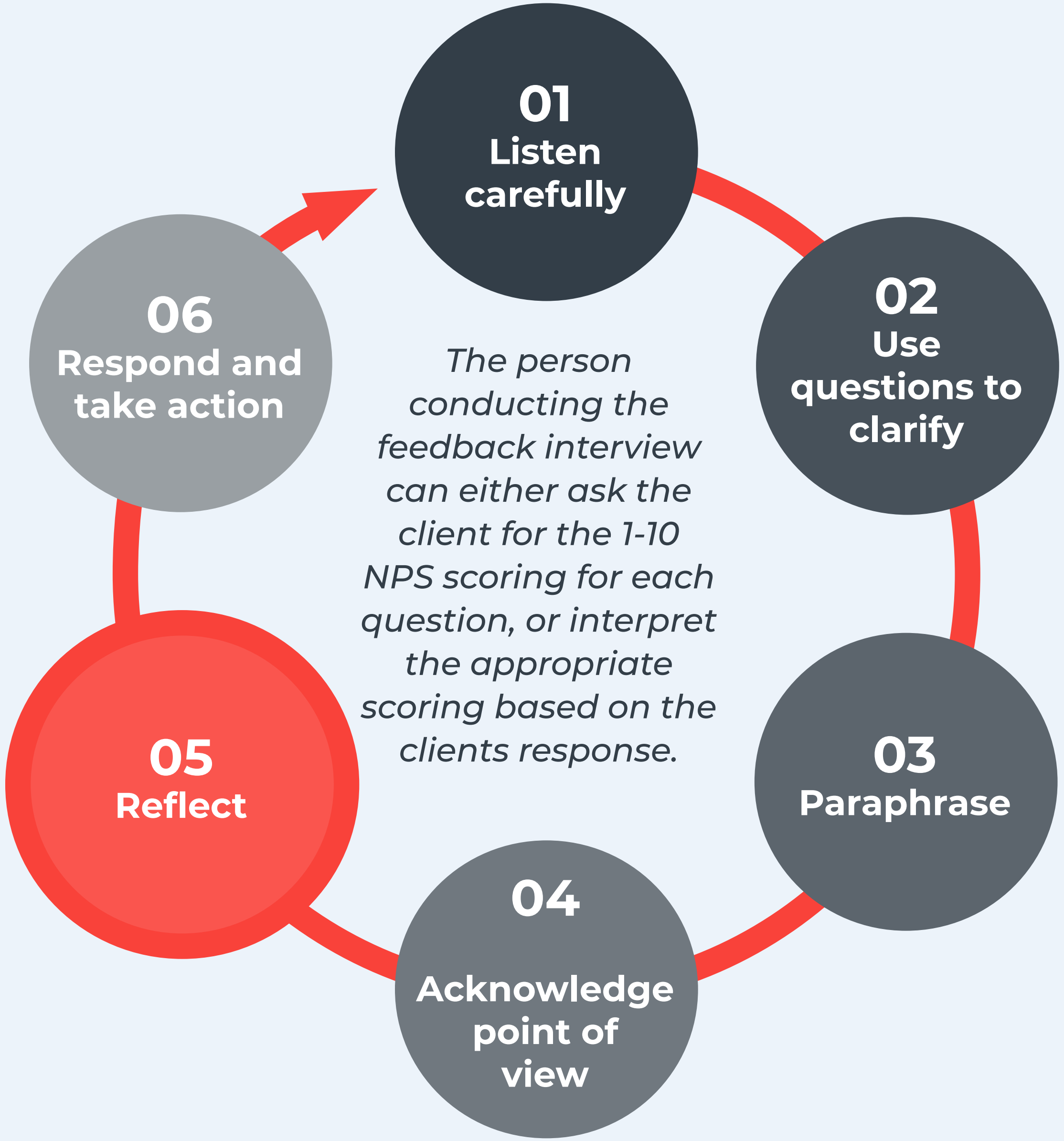
05 - Reflect

Position feedback with your team as a learning opportunity, to build resilience and a positive mindset.

Feedback should prompt discussion and action. Examine trends to ensure we don't read too much into any one piece of feedback and consider what we can do to address situations where our view differs from that of the client.

There are various ways of bringing an independent perspective. WSP's continuous improvement mindset will allow us to have constructive debriefs with our team and senior leadership to ensure we are open to understanding and learning from feedback. Consider the LEAN 'Three C's' approach:

1. What was the client's **concern**?
2. What is the root **cause** of this?
3. What **countermeasures** need to be in place?



06 - Respond and take action

Last in the six steps is our response to any issues raised during the feedback conversation. Even if you need time to investigate with the team before responding, let the client know you are doing this and give them a timeframe by which they should expect to hear back from you.

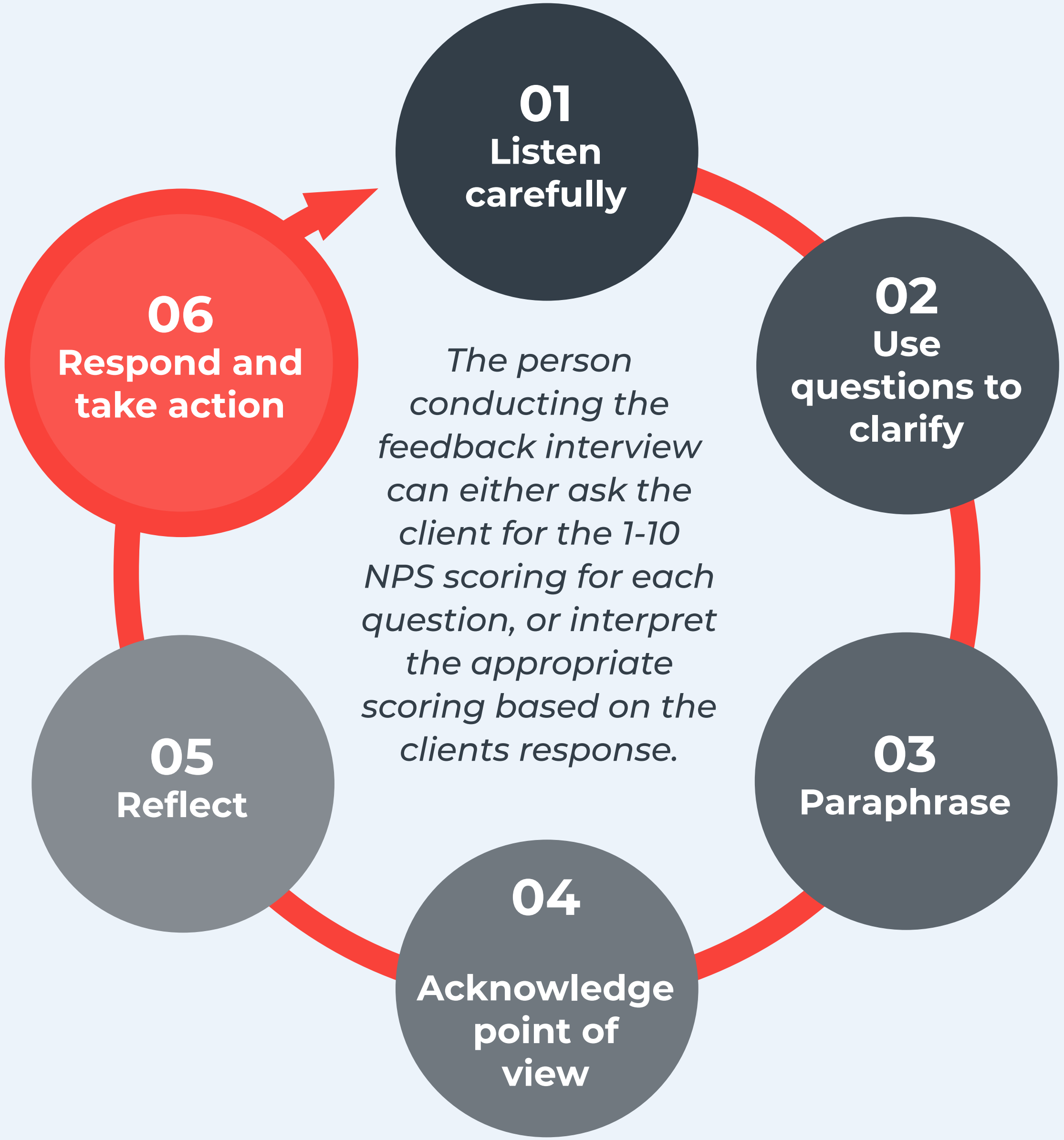
When responding to emotive or heated feedback (especially over email), resist the urge to fire back a defensive retort. Wait a few hours, or even overnight if possible. Use the **BIFF** model to help you respond in a balanced way and to frame your communication.

Brief: Keep it brief to avoid a lengthy dissertation of issues, and don't include extra people unnecessarily or for effect.

Informative: Your response should provide the information being sought, especially if it is being used as written confirmation of a conversation.

Friendly: Keep your tone light and friendly, in order not to escalate any tension and continue to provide the best client experience we can.

Follow-up: Make the commitment to provide timely and responsive follow-up, focusing on continuous improvement.



Resolving issues

All feedback provides us with the opportunity to improve. When we receive a client complaint, or a score of seven or less out of 10 on a quantitative feedback question, we should formally acknowledge and evidence our response in order to meet the commitments inherent to a Client Care culture.

Responding to negative feedback is an opportunity to improve the client experience, and to learn as an organization, so it's important that we get it right.

1. Let the client know that you will respond with follow-up actions to their feedback in a specific timeframe.

2. Send a copy of the feedback to the Client Care Lead and Regional/NBL leadership, and discuss any comments requiring follow-up. Identify needed actions and fully communicate expectations to the team.

3. Schedule time with the client to discuss their concerns, and the plan proposed for corrective actions.

4. Agree on action items, individuals responsible for each action and deadlines and work with your team to achieve these and communicate these to the client.

SECTION 4

Tools, metrics and other resources

Metrics to track performance

Improving and progressing is the most important benchmark – that's why we set ourselves the target of improving our feedback scores each year in the Client Pillar of the WSP's Global and US Strategic Plan. We use three metrics to track our progress.

1. Net Promoter Score (NPS)

NPS tracks how likely a client is to recommend WSP to others on a scale of 1-10. It is calculated by subtracting the percentage of Detractors from the percentage of Promoters.

2. U.S. Scorecard

The average of the scores across the seven questions on our Client Feedback form on a scale of 1-10.

3. Qualitative Feedback

Clients' comments provide a wealth of client insight, future bid collateral, recognition and opportunities for improvement. Capture additional client comments on the Feedback form, and enter those comments into the system so that we have historical data on client perceptions, and can assess improvement over time.

In summary

Leverage client feedback across your Region, NBL, and client team by:

1. Regularly checking to see how well it's going from the client's perspective
2. Encourage empathy and listening in your teams
3. Highlight and celebrate client success stories
4. Share lessons learned and be open to receiving feedback
5. Leverage related tools and resources to customise your approach

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