



Why Companies Should Prioritize the Client Experience

By MARI-ANNE KEHLER

Acquiring new clients is costly and time consuming. According to the Harvard Business Review, acquisition costs five to 25 times more than retention. As businesses to face staffing shortages and regulatory changes, a well-developed client experience (CX) strategy can be a game-changer for companies looking to reduce churn, build loyalty and drive sustainable growth. When considering a formal CX strategy, a three-step approach can ensure long-term success in both client engagement and retention.

DEFINE YOUR VISION

An effective CX strategy begins with a vision for the organization: a clear definition of how a client should feel when working together and what is important to learn about them. Leadership buy-in is crucial not only to communicate these values but to ensure that every department consistently aligns with your CX vision to make it more than just a top-down initiative.

At my advisory and accounting firm GHJ, our CX program started with a commitment to creating a cohesive experience for all clients, no matter which department they work with or how they found us. From this vision, we mapped out what we wanted to learn about clients, why we wanted to learn it and what we would do with this information to achieve our vision.

This process identified common themes from client feedback and uncovered previously unnoticed pain points. Ultimately, these insights informed our client engagement goals and helped unify our approach to service delivery.

Defining a clear purpose from the outset establishes the program's specific goals and metrics and ensures that employees at all levels were aligned and committed to a unified vision.

UNDERSTAND THE CLIENT

Understanding your target client is crucial to understanding their needs, expectations and pain points. In developing our CX program, GHJ developed a research-driven approach that included surveys, interviews and focus groups with both clients and internal client-facing teams. The insights we gathered helped shape our CX strategy by guiding specific actions and creating a roadmap to meet client expectations.

Gathering a well-rounded view of your clients may take multiple rounds, but this information serves as the basis for the entire CX strategy, so it is important to revisit this step throughout the process and ensure client needs are reassessed and reevaluated throughout the process.

During the discovery stage, it is important to be open. You will get a lot of information from clients — these insights can be large or small and positive or negative, and they might even

have nothing to do with the original aim, but that does not mean they are not helpful.

For example, we learned many GHJ clients prefer to follow individual team members over the Firm's LinkedIn page. We adapted our social media strategy to teach team members how to engage clients on their own pages.

CREATE AN ACTION PLAN

Once you understand client needs, it is time to build a CX strategy that turns these insights into meaningful action. Incorporate both quick wins for immediate impact and a long-term action plan for sustained results.

When creating this plan, choose clear, relevant metrics that align with your CX objectives and provide a concrete way to measure progress over time. Metrics should not only track short-term gains but also show how your strategy evolves to meet clients' changing needs. Additionally, assigning roles and responsibilities for each part of the plan fosters accountability, ensuring everyone is aligned in advancing CX goals.

At GHJ, we used this structured approach to identify short- and long-term actions that would enhance client engagement. By mapping these efforts into a three-year roadmap, we created a focused, measurable plan that prioritized high-impact initiatives and built momentum to continuously strengthen our client relationships.

COMMIT TO CLIENT SUCCESS

Uncovering client insights and creating action plan goals are important, but they are also on-going. Your CX strategy is not a one-time project, it is a living, evolving commitment to clients. Client needs and preferences are changing constantly, so remain flexible throughout the process.

A significant outcome of GHJ's CX initiative has been a cultural shift toward greater client-centricity. Although client focus has always been part of GHJ's brand promise, our CX strategy amplified this by strategically involving every department in the client experience. This firm-wide commitment has reshaped GHJ's culture and reinforced the team's alignment with client needs to foster stronger, more proactive client relationships.

Developing and implementing a CX strategy is an investment, and one that works best when you go all-in. For GHJ, prioritizing client experience enables us to deliver quality service that consistently meets our client expectations as we grow.

A client-centered approach enhances any company's brand by fostering trust and loyalty and driving growth.

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