

# Beyond Deadlines: Building Client Value for the Long Term



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# **Beyond Deadlines: Building Client Value for the Long Term**



**[bradcleveland.com/eidebailly](http://bradcleveland.com/eidebailly)**

- **Slides**
- **Ch 4, book**
- **Excel queue calculator**
- **Summary of recommendations**
- **ROI toolkit**



**The first communications cable spanning the Atlantic became operational in:**

**A**

**1858**

**C**

**1926**

**B**

**1876**

**D**

**1956**

## The first message was:

A

May this prove to be a bond of perpetual peace and friendship.

B

Save our ship!

C

Glory to God in the highest; on earth peace, good will towards men.

D

This is the dawn of a new age.



**The cable lasted:**

**A**

**Three weeks**

**C**

**30 years**

**B**

**Three years**

**D**

**Still operational**

Almon B. Strowger received a patent for the electromechanical telephone exchange in 1891.  
**By trade, his profession was:**

A

A sailor

C

An undertaker

B

An engineer

D

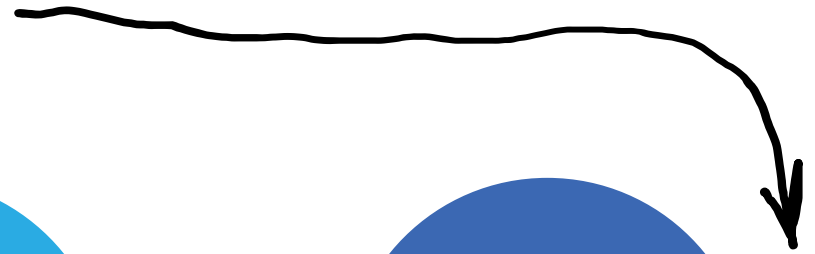
A university  
professor



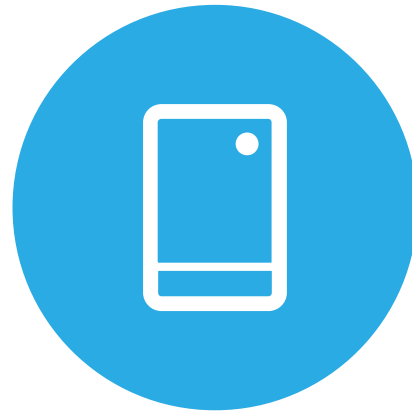
**“We think we invent technology, but  
technology also invents us.”**

**–Richard Farson, Professor**

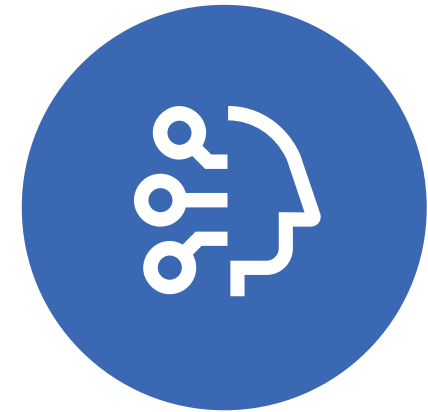
Inflection Point  
(pandemic)



**INTERNET / WEB-BASED**  
(2000)



**SMART PHONES / APPS**  
(2010)



**AI / MACHINE LEARNING**  
(2020)





# The two-pronged challenge

- Evolving customer needs and expectations
- The time-driven nature of work

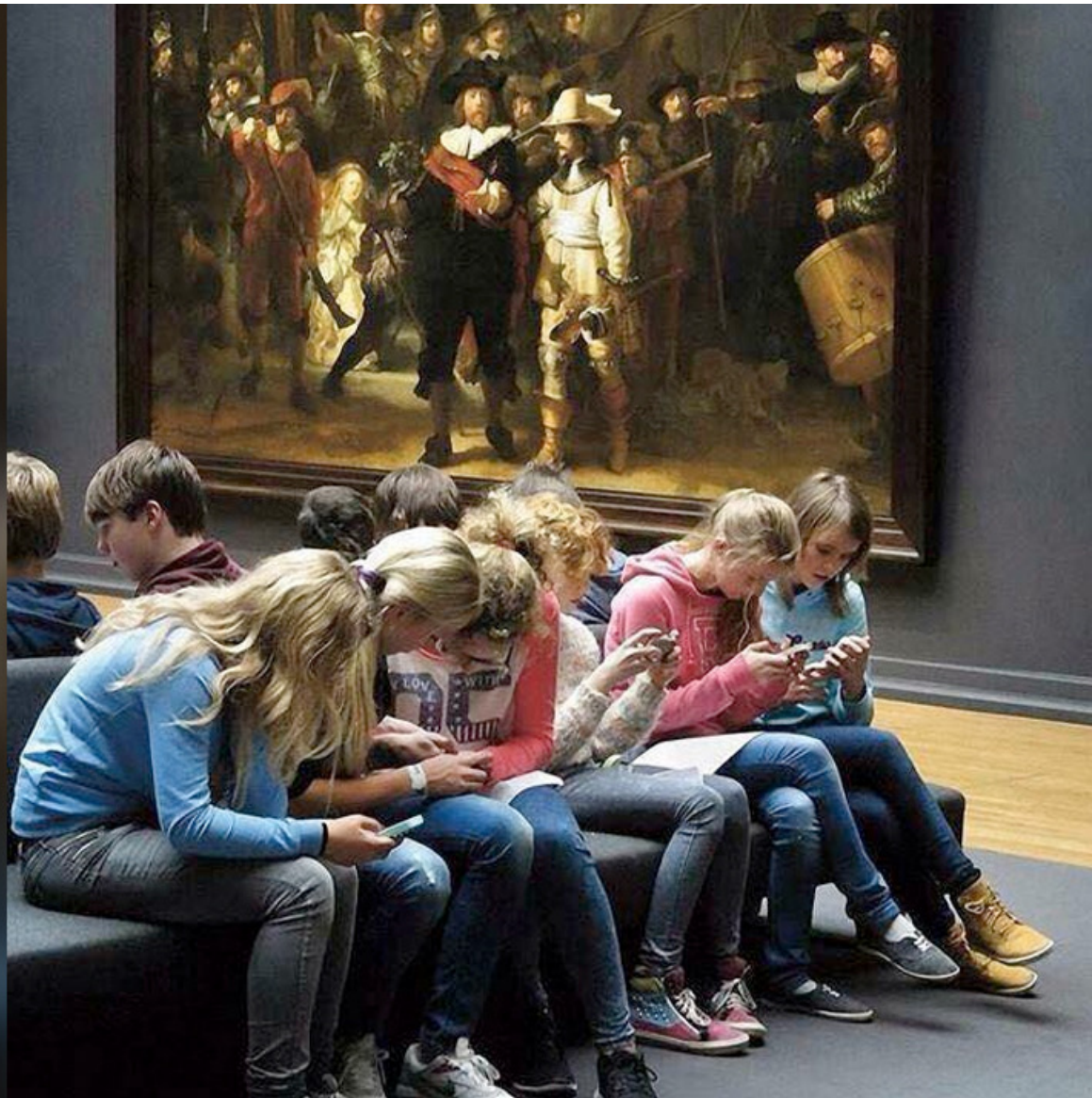




Key Pillar

**Vision**

**The picture  
that went  
viral**



## **REI (core purpose)**

“We inspire, educate and outfit for a lifetime of outdoor adventure and stewardship.”

## **USAA (core values)**

“Service, Loyalty, Honesty, Integrity.”

## **Federal Gov of Australia (vision)**

“Make government services simple so people can get on with their lives.”



## **PURPOSE**

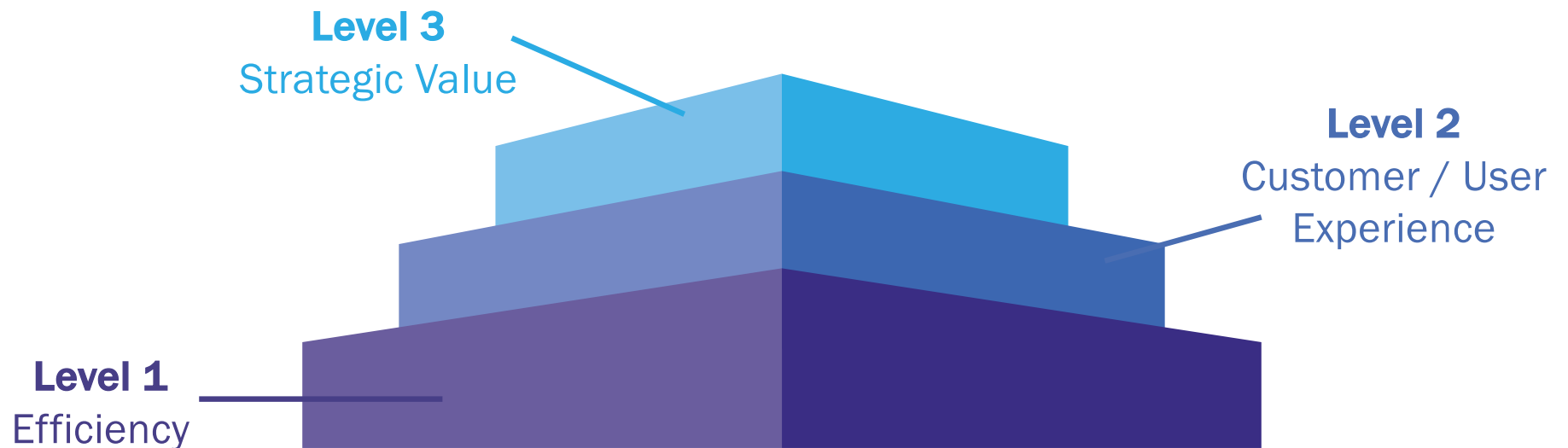
To foster impactful doing by growing our people, elevating our clients, and strengthening our communities.

Source: Eide Bailly



# Service Delivery:

## Three Levels of Value



# A story of...

- Efficiency
- Quality standards
- Vision
- Purpose



## Leading Practices

- ❑ Mission, vision, values drive every decision
- ❑ The organization cultivates value on all three levels



Key Pillar

# Customer Expectations



## Descriptors Used by Clients

helpful thorough friendly enjoy working provide knowledge Excellent  
needs always experience Great Eide Bailly staff  
Great customer service service responsive work advice  
good partner knowledgeable Responsiveness team professional friendly

## Current Firm NPS

**73**

(rolling 12 months)

## Individual Tax Client NPS

**78**

## Ease of Working With Eide Bailly

**8.97**

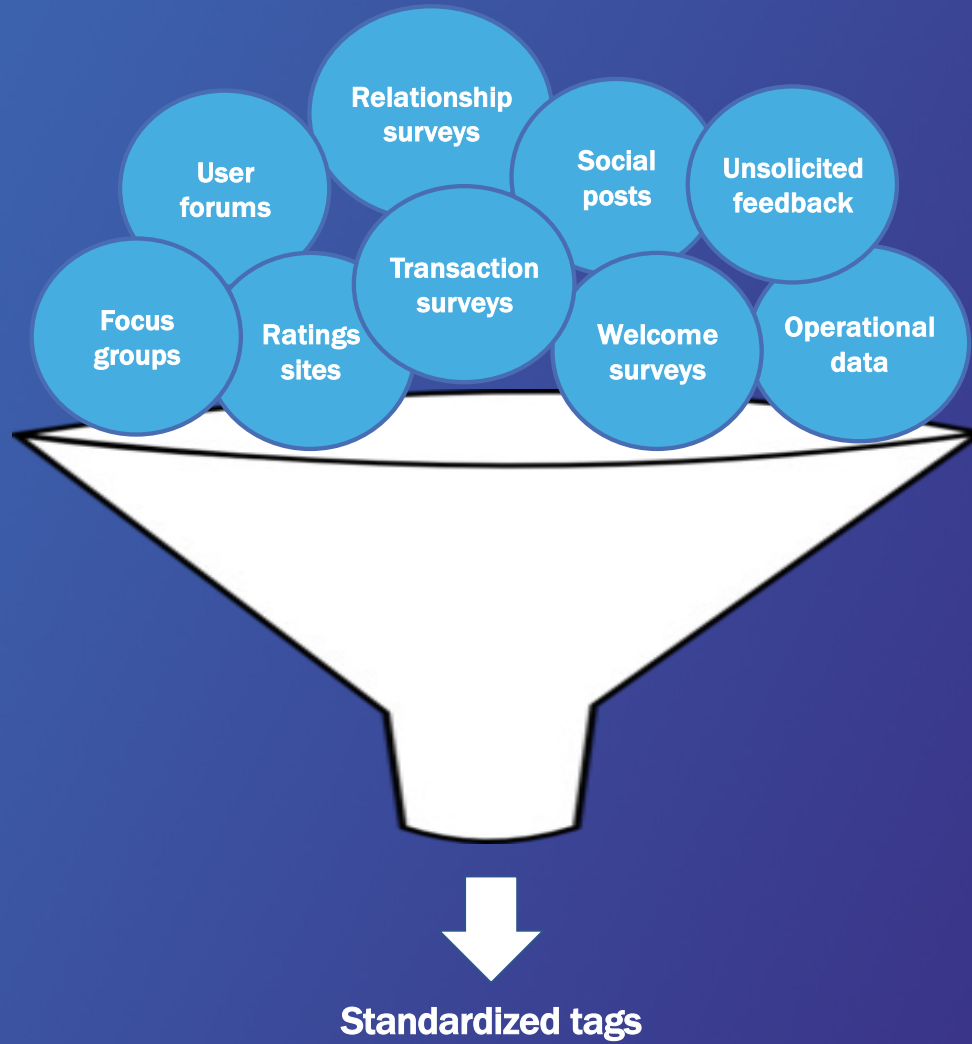
[scale of 1-10]

## Rate of Response

**16%**

[since Feb. 2021; historically 10-11%]


**Source: Client Experience Survey Dashboard**



# 10 Customer Expectations

## Service Interactions


---

- Be accessible (*in the channels I prefer*)
  - Treat me courteously
  - Be responsive to (*and anticipate*) what I need and want
  - Do what I ask promptly
  - Provide well-trained and informed employees
  - Tell me what to expect
  - Meet your commitments and keep your promises
  - Do it right the first time
  - Follow up
  - Be socially responsible and ethical
- 

# Tangibles

## (In-person settings)

---

- Facilities (comfort, appearance, functionality)
  - Employees' appearance (e.g., is there a dress code?)
  - Amenities (e.g., Wi-Fi and water in waiting areas)
  - Design (e.g., how easy it is to get around a building or complex)
  - Safety (e.g., well-lit parking lot)
- 

# Quality Standards

- Safety
- Courtesy
- Inclusion
- Show
- Efficiency





# Long-term Development

- Organizational structure
- HR/career development
- Marketing
- IT/digital transformation
- Et al.

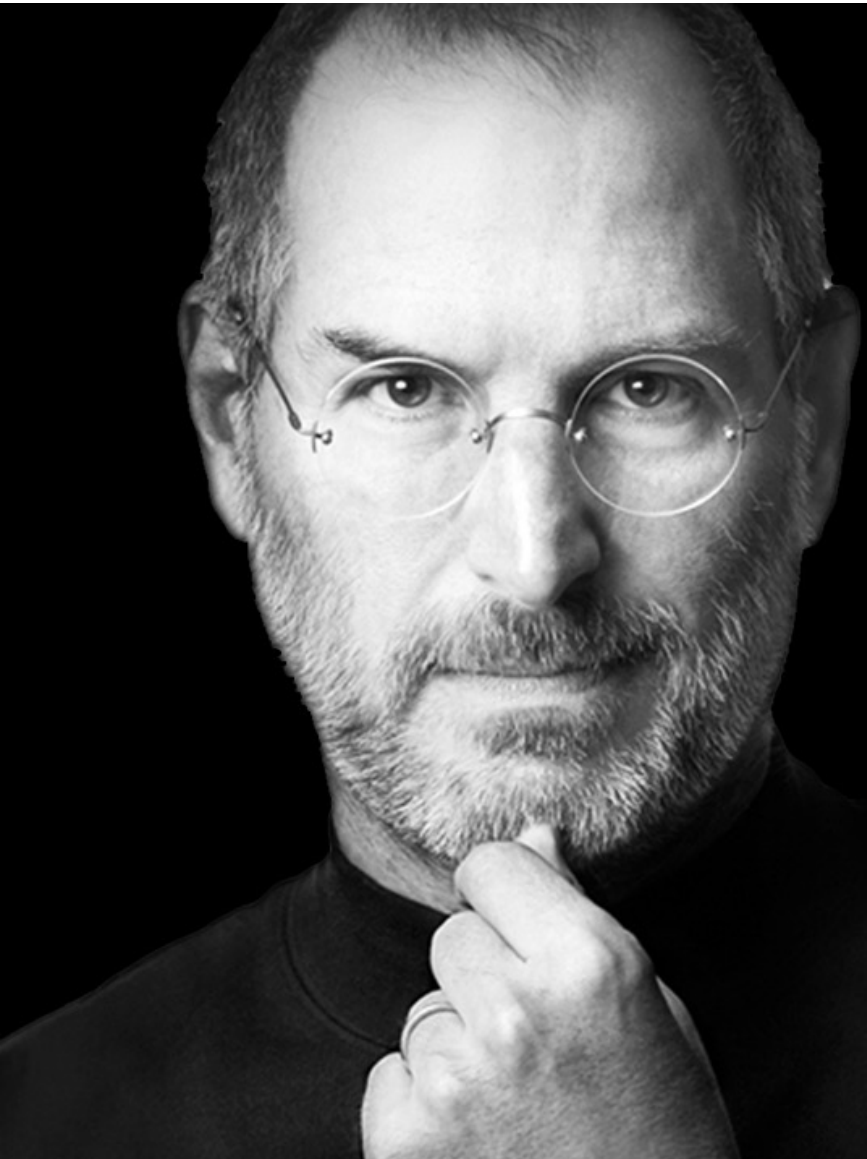
## Leading Practices

- ❑ The organization listens—broadly, intently
- ❑ Customer needs and expectations drive standards and development



Key Pillar

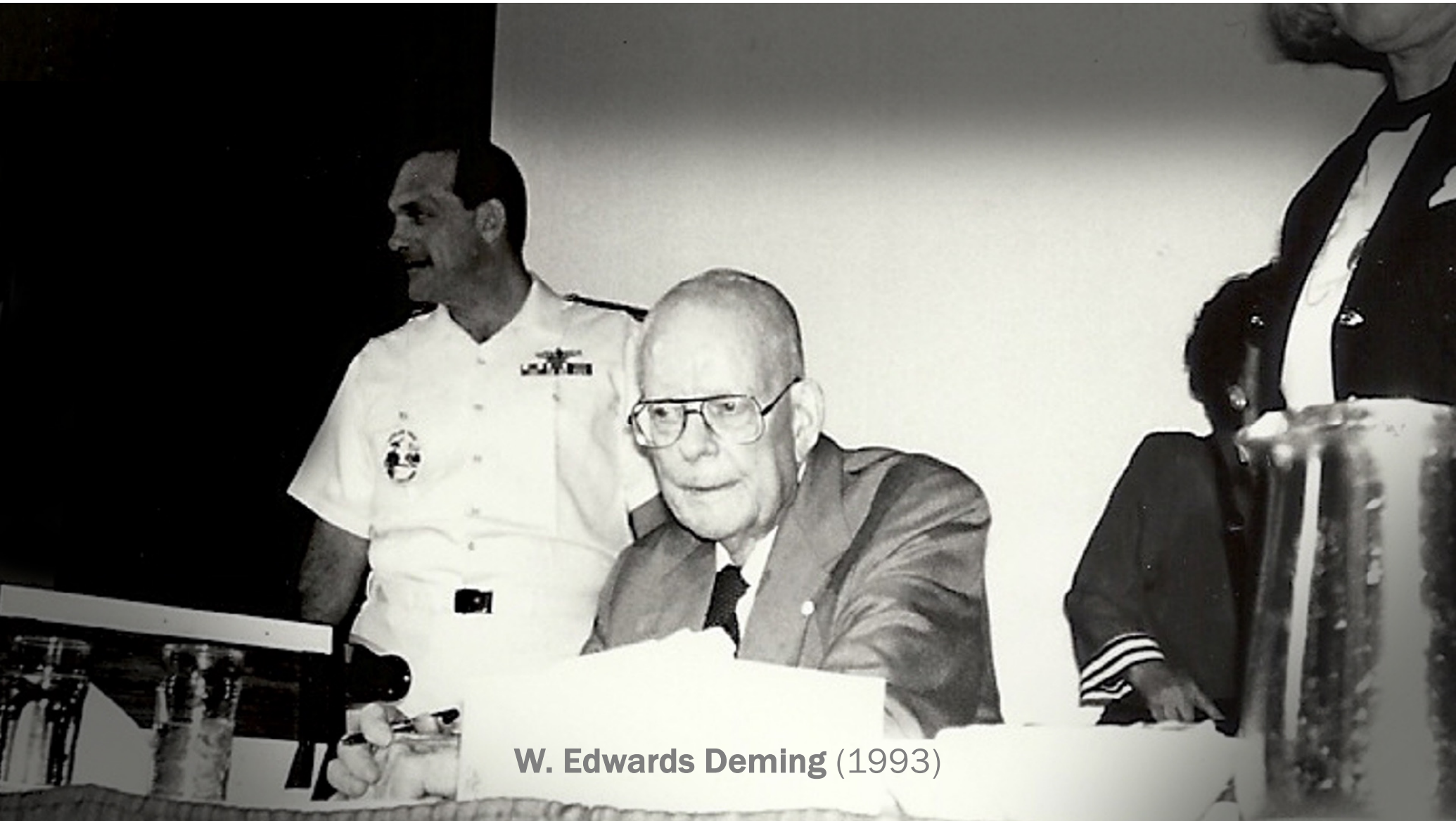
**Innovation**

A black and white portrait of Steve Jobs, looking directly at the camera with a thoughtful expression. He is wearing his signature round glasses and has a light beard. His right hand is raised to his chin, with his index finger pointing upwards. The background is dark.

“You’ve got to start with the customer experience and work back toward the technology – not the other way around.”

**- Steve Jobs, Apple**





**W. Edwards Deming (1993)**

**100% participation**



# The process of innovation



Remove barriers (no time, don't know what to do, etc.)



Ensure managers recognize and support innovation



Develop a way to gather, evaluate and track ideas



Implement ideas that have merit—and show the impact







# TESLA

## MODEL S FOR KIDS

— BY RADIO FLYER —

LEARN MORE



BUILD-A-WAGON



BUILD-A-TRIKE



TRICYCLES



WAGONS



SCOOTERS



RIDE-ONS

## Leading Practices

- ❑ Innovation is part of the culture—100% participation
- ❑ A robust process supports innovation



Key Pillar

# **Customer Advocacy**

# Customer advocacy is...

**1)** The actions you take to focus the organization on doing what is best for customers, **2)** which rewards you with loyal customers who advocate for your organization.

Source: Cleveland, Brad. *Leading the Customer Experience*. New York, Kogan Page, 2021



# Fundamentals

“Let’s Start at the Very Beginning,  
a Very Good Place to Start”

**"Do-Re-Mi" by Rodgers and Hammerstein**

(performed by Julie Andrews in The Sound of Music).

# Erlang C

$$P(>0) = \frac{\frac{A^N N}{N! (N-A)}}{\sum_{i=0}^{N-1} \frac{A^i}{i!} + \frac{A^N N}{N! (N-A)}}$$

# The Nature of Queues



**Input:** 100 customers in 30 minutes  
**Average Handling Time:** 5 minutes

Employees/ SL/20 sec	<= Number of customers waiting longer than x seconds =>											
	5	10	15	20	30	40	50	60	90	120	180	240
17 (11%)	90	90	89	89	88	87	86	85	82	79	74	69
18 (39%)	65	64	62	61	58	56	53	51	45	39	30	23
19 (59%)	46	44	43	41	38	35	33	30	24	19	12	7
20 (73%)	32	30	29	27	24	22	19	17	12	9	5	2
21 (83%)	22	20	19	17	15	13	11	10	6	4	2	1
22 (89%)	14	13	12	11	9	8	6	5	3	2	1	0
23 (93%)	9	8	7	7	5	4	4	3	2	1	0	0
24 (96%)	6	5	4	4	3	2	2	1	1	0	0	0

+ ?? %

How much a portfolio of the world's simplest brands has beaten the average global stock index since 2009

Source: Siegel+Gale, 2022





## Leading Practices

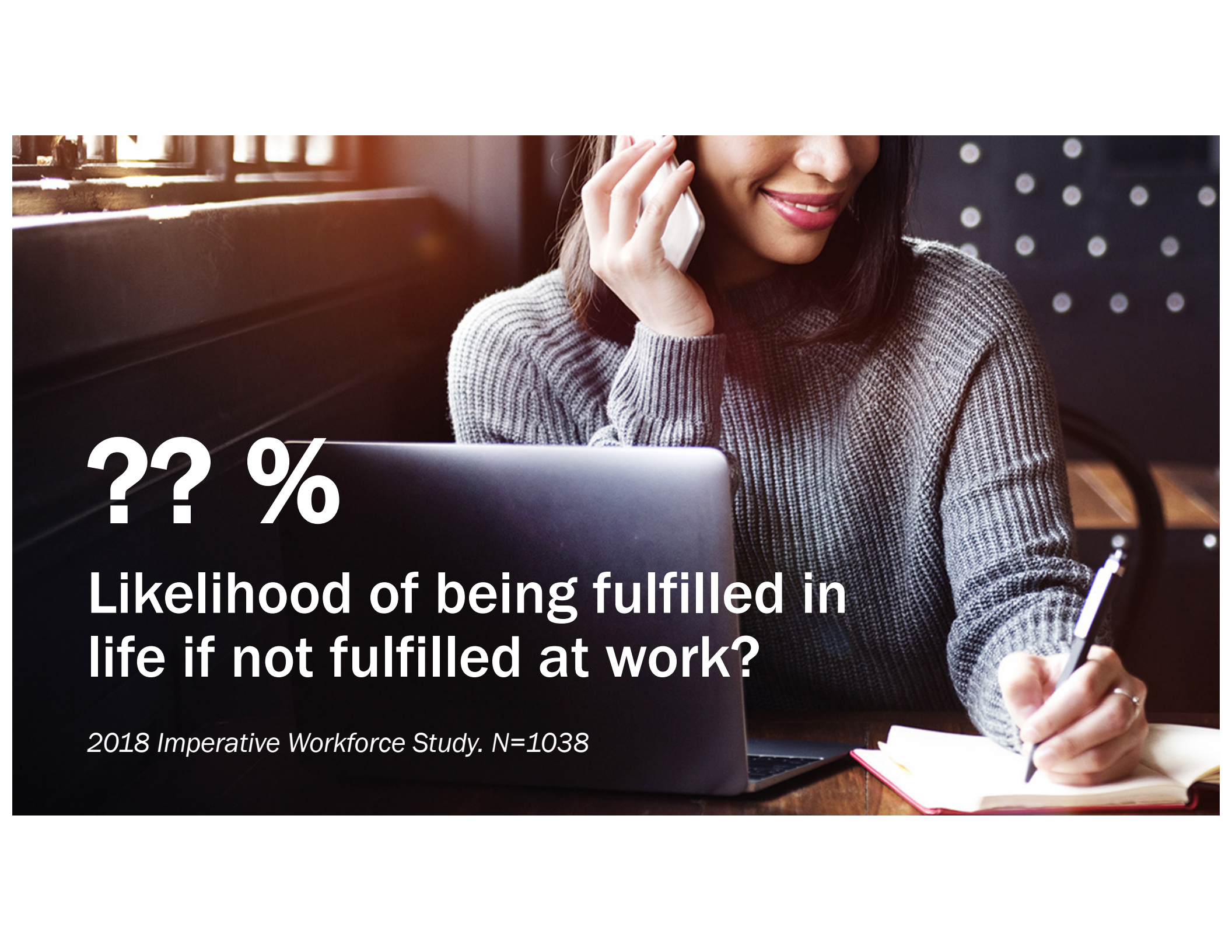
- ❑ There's a relentless focus on fundamentals
- ❑ There's a clear bias towards action



Key Pillar

**Leadership**





?? %

Likelihood of being fulfilled in  
life if not fulfilled at work?

*2018 Imperative Workforce Study. N=1038*

# Returns on Improvements (ROI)

(the good stuff)

Customer  
Loyalty

Brand  
Promotion

Operational  
Improvements

Product and  
Service  
Innovation

Employee  
Engagement



# Costs of Inaction (COI)

(the bad stuff!)

Customer  
Defection

Brand  
Damage

Recurring  
Problems

Compliance,  
Safety, Legal

Employee  
Dissatisfaction

**Celebrate!**



## Leading Practices

- ❑ Decisions consider both ROI and COI
- ❑ The organization celebrates—specifically and often

**Vision without action  
is a daydream. Action  
without vision is a  
nightmare.**

***- Japanese Proverb***





# Beyond Deadlines:

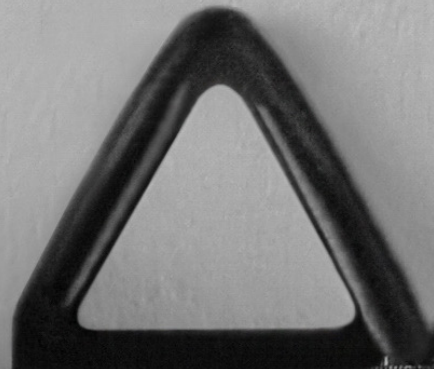
## Building Client Value for the Long Term

- Vision, mission, values drive every decision
- The organization cultivates value on all three levels
- The organization listens—broadly, intently
- Customer needs and expectations drive standards and development
- Innovation is part of the culture—100% participation
- A robust process supports innovation
- There's a relentless focus on fundamentals
- There's a clear bias towards action
- Decisions consider both ROI and COI
- The organization celebrates—specifically and often





What's your story?



# About

Brad Cleveland is known as one of today's foremost experts in customer strategy and management. He has worked across 45 states and 60 countries for clients as diverse as American Express, Apple, USAA, the University of California and the federal governments of Australia, Canada, and the U.S. Brad is author of *Contact Center Management on Fast Forward* (ICMI, 2019), which received an Amazon.com best-selling award, and *Leading the Customer Experience* (Kogan Page, 2021), which was selected as a NYC Big Book Award distinguished favorite. His LinkedIn Learning courses on customer service and customer experience topics have received close to 1 million views. Brad is a founding partner and former CEO of the International Customer Management Institute (ICMI) and is today a sought-after speaker and consultant.

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