



**Meridian West**

## **Case study:**

**Mapping the client journey to  
improve client experience at Grant  
Thornton International**

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## *Background: Achieving a consistent, differentiated client experience*

Grant Thornton International Ltd (GTIL)<sup>1</sup> is a \$4.8 billion international network of independent audit, tax and advisory firms with 47,000 staff across 130 different countries. In developing the new 2020 global strategy, differentiation was a key consideration, which in turn led to a strategic focus on the brand experience for clients, employees and wider communities.

As Prity Kanjia, GTIL's Global Client Experience Programme Manager, explains, the firm saw the Grant Thornton experience and financial performance as intrinsically linked: 'We came to an understanding that if the firm creates a fantastic experience internally for its people, then that will create a fantastic experience for our clients. With a fantastic client experience, growth in revenue will follow.'

## *Gathering feedback to assess base-line performance*

With a new strategic goal in place, GTIL set about implementing the actions that would support the delivery of an outstanding client experience. Its first area of focus was client feedback. At the time, GTIL had no consistent mechanism for reporting client feedback and there was no mandate for member firms to collect such data. The firm needed a baseline from which to judge improvements in client experience, so GTIL's Board of Governors agreed that all member firms should measure client feedback by the end of 2016.

However, simply collecting feedback wasn't enough to drive change; this insight had to be linked back to the firm's overall growth strategy. A key part of GTIL's strategy is to win more multinational work from large corporates but this meant being able to offer a consistent client experience for clients engaging with multiple Grant Thornton member firms across the world. As Prity explains: 'It is important for us to reassure multinationals that they will get the same level of experience across all our markets, regardless of how we work behind the scenes.'

## *Identifying internal client experience champions*

To address inconsistencies in the client experience, GTIL first appointed a team of client experience champions in each member firm to act as evangelists who would promote the benefits of improving client experience to their colleagues. Next the firm set about developing a client journey map. This framework visualizes what a typical Grant Thornton client might experience when working with a member firm/s, including how they select providers, how the service is delivered to them and how the relationship evolves over time. By mapping out client interactions in this way, Grant Thornton wanted to understand better where clients might have suboptimal experiences and where there were opportunities to add more value to clients.

With a draft framework in place, GTIL – with the help of consultancy Meridian West – carried out in-depth interviews with partners from member firms around the world to validate the framework and

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to identify examples of good practice behaviours at each stage of the journey that could be replicated in other parts of the world. The internal reactions were overwhelmingly positive. A sample group of clients was then also interviewed to understand which parts of the journey they thought added most value to their experience of working with external auditors and business advisers. Using these internal and external insights, GTIL defined minimum service standards for each step of the client journey. These were supported with a number of 'brilliant basics' – the simple things that have a disproportionate impact on client experience – as well as advanced practice techniques that would stretch member firms that were already delivering high levels of client service.

### *What next? Tracking improvements, increasing capabilities of staff members*

The next step for GTIL is to use its client journey map and client experience behaviours as part of its global learning and development programmes. The firm is developing a series of workshops that will focus on improving the client experience capabilities of Grant Thornton staff around the world. These will include a particular focus on training for new staff to make sure they adopt good customer service habits from the outset of their career. The firm will continue to collect client feedback at the different stages of the client journey in order to track improvements as a result of its implementation programme.

### *The results: a better coordinated global client experience and a stronger reputation for GTIL*

In Prity's view mapping the client journey has had many benefits. 'We have identified opportunities to introduce more efficient project management and improve our global coordination, both of which should lead to better margins and increase the likelihood of gaining repeat work from our clients,' she says. GTIL has developed a better understanding of how clients come to work with member firms in the first place, and is now better able to pinpoint exactly where clients are most at risk of defection. 'Once you become known as a firm that delivers excellent client service,' says Prity, 'people want to work with you again and again. They give you more work, they recommend you to their colleagues and peers, and that leads to business growth.'

Case study adapted from Alastair Beddow and Ben Kent, *The Professional Services Leadership Handbook* (Kogan Page: 2017):  
<https://www.koganpage.com/product/professional-services-leadership-handbook-9780749477349>

