

# New Research Study Shows Professional Services Across the UK are Missing the CX Basics, and it is Costing Them Business



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Customer experience (CX) is the new business battleground for the professional services sector, yet a new research study assessing the experiences of potential customers shows many firms, across all regions, are letting themselves down and may have even damaged the business.

The results, published by insight6 in The Professional Services Client Journey Report 2021, is the customer experience specialists’ most ambitious study to date and show varying results from region to region.

The comprehensive study included 256 companies across the UK with 500 new enquiries across four principal types of professional services firms - accountancy, insurance, and finance, legal and property. The research covered the full customer journey of a new enquiry from the basics, such as how long it took to answer the phone and whether the initial contact was welcoming and how long it took the firms to follow up their enquiries and more.

The findings now provide a benchmark for customer experience and satisfaction within the professional services industry by region – with the UK average performing poorly with a Net Promoter Score (NPS)\* of -42.

The South West was the best performing region overall, however still badly with an NPS of -24, and the North of England scored the worst with -55. The remaining regions in order of best to worst NPS were as follows: Scotland -29, Wales -37, South East -39, Midlands -41 and Northern Ireland -51.

For comparison, Amazon's NPS is 53, Netflix is 55 and Apple is 56. Research by the London School of Economics shows that for every 7% increase in a brand's NPS, their revenue will grow by 1% as a direct result.

"It is clear that professional services firms have a huge opportunity to improve CX, deliver a superior experience to both new and existing clients, and reap significant business benefits in doing so," says Jonathan Winchester, insight6 CEO.

The study found firms providing excellent CX, but for many there is a huge opportunity for improvement. Typically, it is a simple matter of applying emotional intelligence - a human touch, an effort to listen and explain without jargon, and making a follow-up call.

Jonathan adds: "Winning over customers is about more than clinching a one-off sale. It is about winning their loyalty and their trust for a lifetime. Helping customers with their finances, their homes, their jobs, or their legal affairs all require a human connection. Establishing that connection with customers through excellent CX is the most effective way to make your company stand out. And as every business knows, customers who recommend your services are the most powerful salesforce in the world."

What is interesting is that it is not the complex nature of the job, or the expertise required that is letting professional services firms down, but the most basic of day-to-day interactions that are costing them dearly. As well as calculating NPS scores, the Professional Services Client Journey Report 2021 unveils a catalogue of basic, and avoidable errors, that caused a breakdown of the customer journey and would have potentially lost these firms business.

Customers' expectations are rising. In a world that is moving

rapidly to new communication channels, and with younger generations (the customers of tomorrow) increasingly keen to use alternative communication channels, professional services firms are falling behind.

Website contact forms are a quick and convenient way for customers to contact businesses and are frequently used. However, the Report shows over a third (34%) of web enquiries made by a potential client went completely unanswered. A poor experience at the 'interest' stage of the customer journey reflects badly on the firm, and prospects may feel their enquiry is unimportant and therefore opt to do business with a responsive competitor.

You may expect professional services firms to have a better handle on traditional communications, but this was not the case. The Report shows 42% of phone calls were not returned, even when the potential new client had left a voicemail. In fact, only 8% of companies bothered to follow up a new customer phone enquiry within the next working week; this rose slightly to 10% when the enquiry was made via email.

"Professional services firms know that the best businesses have a long-term vision and that they have a legacy of service and good customer experiences. They are often unaware, that through weak CX and fragmented customer journeys, their own business is putting their reputation and legacy at risk," says Jonathan.

Overall, researchers were underwhelmed by how the firms handled their enquiries. Just 23% felt the team member attempted to add value or go further to help them, and only 43% said that they would recommend the business to others.

Behind poor CX you can find underlying problems in a firm's culture, such as short-term targets, disengaged teams or siloed working. Beyond technology, effective CX is often about empowering staff and providing them with the skills, tools, and authority they need. Finding the problems is the starting point for improving CX, but it is also half the battle because once the flaws have been identified, the solutions are often very straightforward.

Jonathan concluded, “Professional services firms are missing the most cost-effective solution for improving their bottom-line. Put simply, a well-mapped customer journey and a positive customer experience is the surest pathway to sales.”

If you would like to download a copy of the report go to:

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