

2025 LEAD Project Proof of Concept

Project Team:

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CORE: Client Operational Review & Experience Initiative

GOAL

The **goal** of the client operational review and experience initiative is to improve our communication with owners and end users to build better relationships. The program will be set up to provide a flexible structure to help establish more touchpoints with our clients to get information needed to help our teams to be successful.

Note: This is not a “what are we doing wrong” exercise, meaning we do not want to use the input to change specific things unless we uncover major market trends or see a consistent need for improvement in a certain area.





Current State

H&W Impact

Current State

- Current state of owner check-ins provides opportunity for more consistent and intentional conversations.
- Current state of owner check-ins could benefit from a more structured process.

Impact to H&W

- Stronger client relationships.
- Multiple points of contact for clients.
- Show clients that we are listening.
- Captures trends across divisions and teams.
- Access to client portfolios for seamless team transitions. (Client preferences.)

Ideas

Obstacles

Ideas + Approaches

- Create a list of specific “rounding” questions. Relationship might involve C-Suite and Executive level support.
- Team lunch/check-ins.
- Follow H&W Planning for Success timeline goals
- Need to identify a lead for the initiative. Past experience has shown that programs are more successful if there is one designated person driving.
- Incorporate client mission and values into our why.

Obstacles + Surprises

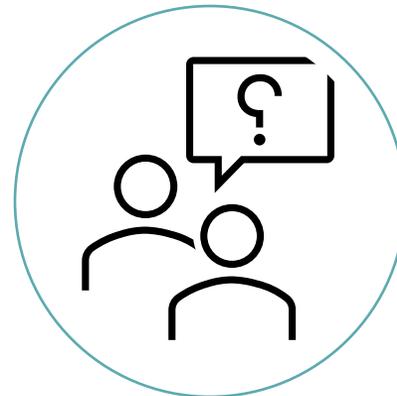
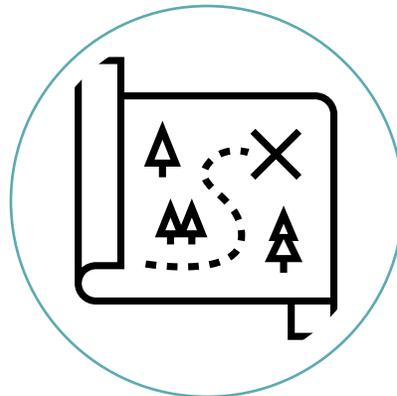
- Deciding on a team/specific member to be the client outreach contact.
- Create CORE team for outreach.
- Who is driving this initiative moving forward?
- Narrow current goal to only clients. Future could include facilities, end users, architects.



Action Items

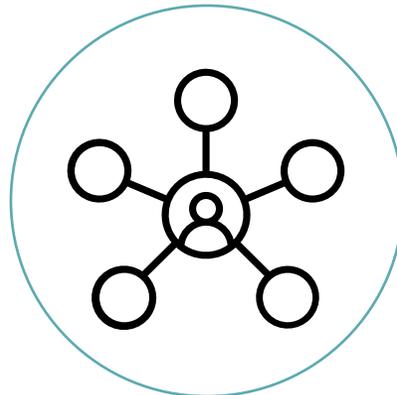
Next Steps

Create Flexible Structure and
Framework for Rollout
Develop the Next Generation of
Relationship Holders



Establish Meeting Schedule &
Client Questions

Interview H&W Stakeholders
(Sanders, Oswald, Shem, Shipley,
Peyton)



Interview Clients (Share THE WHY)
(NISD, SSISD, WB, Village Church,
SeAH, Encore?)