



Long-Term Client Relationships

Cindy Milrany
Chief Financial Officer
Chief Strategy Officer



Freese and Nichols, Inc.

- Multi-service engineering, architecture and environmental science firm
- 122-year history means experience, strength and stability
- 16 offices in Texas, North Carolina, Oklahoma, Georgia
- More than 600 experienced professionals, technical experts and support personnel





Why Long-Term Clients Matter

"The weaker the firm is at developing new business from existing client relationships, the lower the value of getting new clients."
Managing the Professional Services Firm,
David H. Maister



Year 1 Year 2 Year 3 Year 4 Year 5

- Referrals
- Efficiency
- Add'l Work




Our Client-Focused Culture



Hedgehog Concept
Be the very best at client service, resulting in long-term mutually beneficial relationships

Mission
Innovative approaches . . .
Practical results . . .
Outstanding service

Vision
Be the firm of choice for clients and employees




How We Achieve Our Client Focus

Core Competencies



- Understanding client needs
- Being the technical experts
- Exhibiting ethical behavior
- Being a connector
- Being a trusted advisor






Understanding Client Needs

On-going Client Input

Client Panels
Focuses on specific issues of importance to clients
Includes executives and managers from key accounts
ENI managers and staff invited to attend

Executive Client Visits
Visits from ENI senior leaders to client executives
Focuses on understanding clients' problems and concerns
Results documented for future reference

Understanding Client Needs

Annual Market Scans by Practice Leads

Understanding each market's problems and concerns

- Input from TEP teams about legislation, regulations, services, technology
- Input from Account Directors and Client Reps about changing client problems and expectations

What we learn about market expectations

- Projected growth in current and emerging services
- Demand for current and emerging technologies
- New services/technologies to watch in the future



Understanding Client Needs

Client Representative Visits to Key Accounts

Creating a vision for the client

- Gold Sheet for each account
- Vision statement and goals for client relationship
- Buy-Sell Hierarchy Goal is Level 5 – Contribute to Organizational Issues
- All client visits documented for future reference



Understanding Client Needs

Client Feedback

Client Satisfaction Surveys



Surveys at mid-point and end of project

- All projects surveyed
- About 50% return rate
- Goal is "TopBoxFive"

Examples of what we have learned from clients

- More consistent project communications
- Formal project manager hand-off process
- Greater emphasis on innovation and resilience






Being the Technical Experts

Keeping Projects on Track

Project Manager Portal

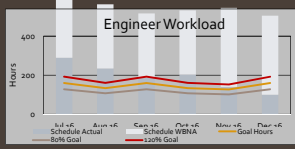
- PM Dashboards
- PM Processes
- Project News
- Project Status
- Project Actions
- Project Analytics

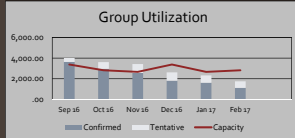


Being the Technical Experts

Tracking Resources

Engineer Workload



Group Utilization








Being the Technical Experts

Keeping the Client Up-to-Date

One-Page Report

- Automated
- Project updates
- Tasks and deliverables
- Upcoming submittals
- Additional issues

Being the Technical Experts

Technical Excellence Program

"Integrity and competency. One without the other doesn't do much."

- Monitor services, technology, regulations
- Create and improve processes
- Maintain TEP portal
- Input to market scans






Being the Technical Experts



Innovation

Bringing Innovative Solutions to Clients

- I² Team
- Innovation Newsletter
- Innovation Award
- Making clients aware of our innovations



*Bridging the Gap:
An Innovative Crossing for the Trinity River*

Being the Technical Experts

Resilience

Bringing Resilient Solutions to Clients

Ethical and responsible stewardship of clients' natural and man-made resources anchor FNI's approach to projects



Municipal Raw Water Production Facility




Being the Technical Experts

Keeping Clients Informed

Bringing Clients the Latest Developments

- Client seminars
- White papers
- Interactive online resources
- Conference presentations
- Association boards and committees



Interactive Precipitation Forecast Map




Exhibiting Ethical Behavior

The First Thing We Ever Built Was a Reputation



Recipient of the National 2008 *American Business Ethics Award*, by the Foundation for Financial Service Professionals




Exhibiting Ethical Behavior


First, We Emphasize It

Define Expectations

- The first value in our guiding principles
- Employee code of conduct



Train Employees

- Annual FNI ethics training for employees and clients
- Focus on ethics in employee orientation and leadership training



Measure Perceptions

- Employee survey question about ethical behavior

Exhibiting Ethical Behavior

Then,
We Practice It

Taking care of the client

- We fix the problem first, then address responsibility
- We always disclose any potential conflict of interest
- We avoid even the perception of questionable behavior
- We have zero tolerance for ethics violations by our employees or our contractors

Being a Connector

Assistance with Funding Sources

- Bond Programs
- Grants
- Public/Private Partnerships
- Enterprise Fees

Being a Connector

Life Cycle Solutions

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    graph TD
      A[Study the Problem] --> B[Plan the Solution]
      B --> C[Design the Solution]
      C --> D[Oversee Construction]
      D --> E[Manage Assets]
      E --> A
  
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Being a Connector
Integrated Solutions

Baldridge Consulting

Being a Trusted Advisor
Focus on the Client, Not the Project

"Unlike Freese and Nichols, most consulting firms haven't figured out that they must be a partner, not a vendor."

- Our goal is a level 5 relationship with our clients
- We understand that each project must contribute to the client's overall business needs
- We provide continuity of practice across generations
- We have ladder relationships with our clients

Baldridge Consulting

Being a Trusted Advisor
Helping Clients Improve Performance

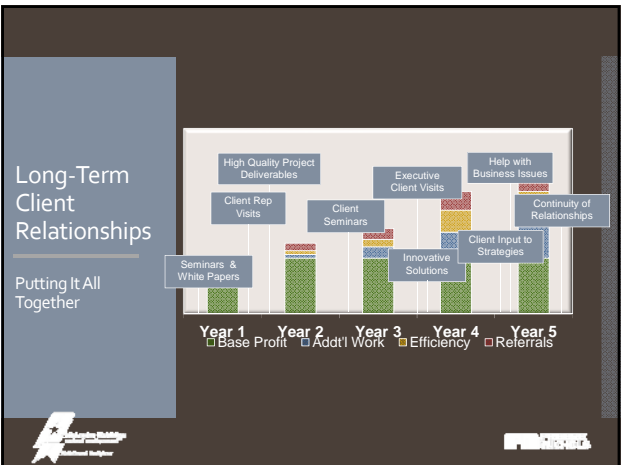
Baldridge Consulting with Our Clients

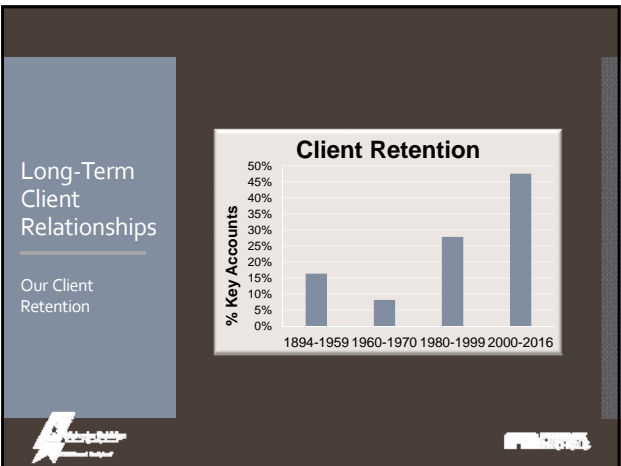
- City of Ft. Worth – Process Improvement
- City of Irving – Texas Quality Award Application
- City of Prosper – Internal Baldridge Assessment
- NC Municipalities – Departmental Strategic Planning

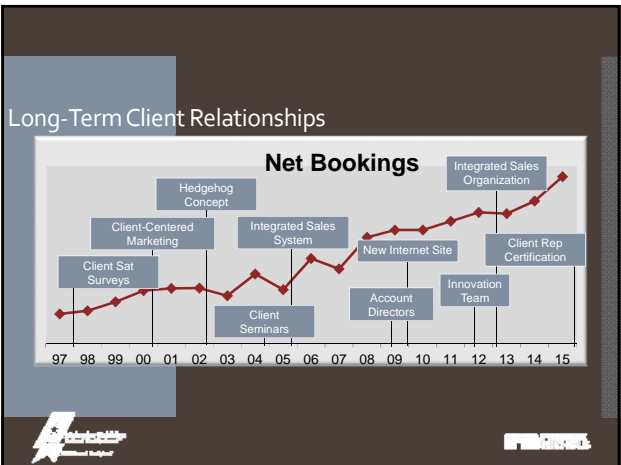
Baldridge Presentations to Our Industry

- Texas Municipal League
- North Texas Commission
- Texas Society of Professional Engineers
- Society of American Military Engineers

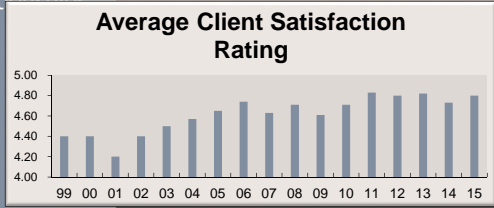
Baldridge Consulting







Long-Term
Client
Relationships



Thank You!