



Client Service Principles

Our approach to
client service excellence

For internal use only



Our client service principles are the **commitment we make to our clients to deliver service excellence and value for them.**

Our clients measure our performance against these principles through our Client Feedback process.



Make and meet **all** commitments we make to our clients

Work with our clients to clearly define their expectations

- Establish and validate mutual understanding of expectations.
- Understand what constitutes value for them and how they would like to be served, then let this be our North Star in how we serve this client.
- Identify the key decision makers and the approval process they follow when making a buying or sourcing decision.
- Establish and monitor timelines and milestones
- Periodically ask the client “What can we do differently?”. Don’t ask “How are we doing?” or “Can we do something better?”. They will be too polite to give us their honest feedback.

Deliver what is agreed upon... and more

- Understand the client’s objectives and identify specifically what we will deliver to drive value for them.
- Confirm expectations.
- Serve them how they would like to be served, not how we would like to serve them.
- Under promise and over deliver. Strive to delight!

Be easily accessible to our clients

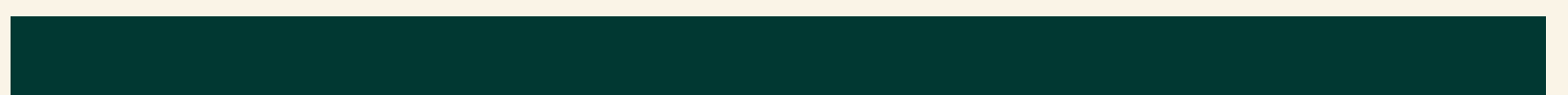
- Provide the client with information on how to access us.
- Establish the method for raising inquiries that will yield the most timely and accurate response.

Provide valuable responses to all our clients' inquiries

- Respond to client inquiries within an agreed upon period with either a direct response, or commitment to when the inquiry will be resolved.
- Thoroughly research issues and solutions, providing options where appropriate.

Become obsessed with our clients

- Anticipate client needs by proactively seeking feedback and understanding their goals.
- Deliver personalized solutions that exceed expectations at every interaction.
- Always make it right for them, even in the circumstances when they may not be right.



Thoroughly understand our clients' business and what is important to them

Understand what is important to our clients:

- Understand how we can provide value to the client.
- Understand unique issues of key client stakeholders (professional and personal).
- Confirm with the client what will make this relationship a success.

Anticipate our clients' needs

- Proactively identify and address client issues and concerns.
- Review client expectations on a regular basis.
- Re-check assumptions and dependencies as the engagement evolves.
- Share insights and discuss pertinent business and industry issues.

Understand our clients' business

- Understand our client's competitive positioning.
- Understand our client's business model, recent performance, key performance indicators, and strategic priorities.
- Learn our client's organization and culture.
- Ensure we are familiar with all aspects of our client's business and culture. The more we know about the client, the better we can serve them.
- Gather, share and apply industry insights and best practices to deliver **surprise** value.

Provide value and build trust through technical competence and consistent results

Instill confidence and trust in the quality of our products and service:

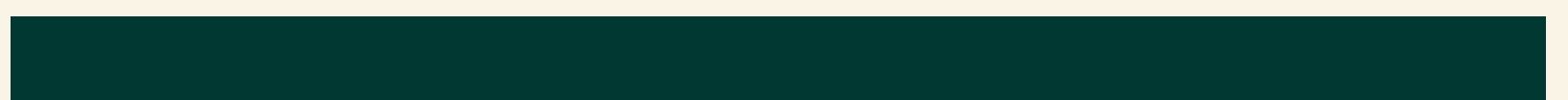
- Be open about our selection criteria and quality control processes.
- Provide detailed information about each producer we work with, including their history, winemaking philosophy, and sustainable practices.
- Drive transparency around the journey of each wine from vineyard to customer.
- Offer a **Satisfaction Guarantee** on all products.

Offer up-to-date skills and expertise

- Build long-term partnerships and maintain strong relationships with top hospitality businesses and retailers.
- Providing responsive customer service and expert consultation.
- Examine and apply relevant learnings.

Provide value to our clients' organization

- Understand and articulate to client how and what value we delivered via quarterly or annual dashboards (e.g. events, tastings, marketing).
- Engage in a discussion with the client regularly to validate their perception of the value delivered.
- Conduct a quarterly review with our Tier 1 and Tier 2 accounts and joint planning with our Tier 1 accounts.



Demonstrate professionalism through effective interaction and communications

Communicate effectively

- Define client specific working norms and communication style.
- Define with the client the process we will follow for managing change.
- Demonstrate empathy and sensitivity for client in all interactions.
- Respect the culture of client organization and team.

Keep our clients informed of project/order status

- Capture our commitments and client acceptance via a Buy/Sell Agreement.
- Create a workplan in Jira by Atlassian and manage against it to ensure we are delivering on our commitments.
- Discuss shipment/order status with our client regularly.

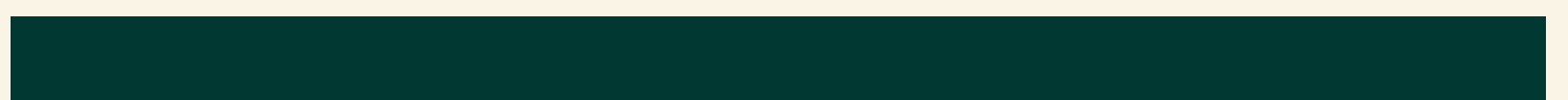
Perform as a well organized team

- Agree upon and adhere to team working norms
- Confirm ownership and accountabilities for tasks and deliverables.
- Work with the team to deliver on client expectations.
- Avoid duplication of effort and redundant work activities. Reduce or remove muda (wastefulness). If it does not drive value for our clients, then why do it!

- Establish a method to effectively communicate within the team. Find out how they would like to be communicated (e.g. e-mail, phone, SMS) and use this as the primary method.
- Continuously capture knowledge about the client in our CRM (HubSpot), what drives value for them, how they would like to be served. Refer to it often to meet and exceed their expectations.

Work collaboratively with our clients

- Establish clear client roles and responsibilities on who and how we are going to support our clients.
- Foster friendly relationships and always seek ways to move them from clients to friends. Invite them out. People do business with people they like.
- Instill a sense of collaboration and community. Always seek ways to overdeliver. Goodwill often finds its way back to us.
- Seek to create an atmosphere of camaraderie and mutual respect.
- Determine how we will transfer knowledge to our client.



Provide a **NO Surprises** experience

Proactively address issues

- Track issues, identifying action steps and responsibilities to resolve issues in a timely manner.
- Conduct a lessons learned session and share learnings insights and action plan with client.
- Solicit client feedback regularly, formally and informally.
- Share client feedback with the team.
- Address any issues coming out of client feedback.

Provide timely communication of price increases and fee changes

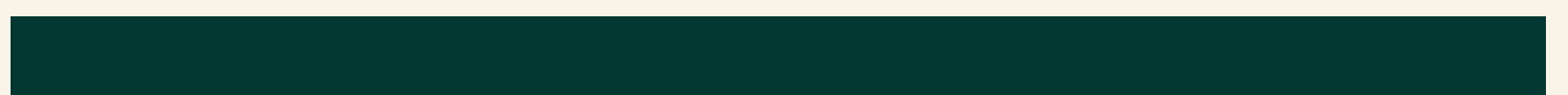
- Communicate timely any price increases that we are not able to absorb as a result of things that lay outside of our control (e.g. producer price increases, transportation surcharges, etc.)

For **Consulting Engagements**:

- Monitor actuals in comparison to budgeted fees, identifying estimate to complete.
- Track any items that are 'out-of-scope' and discuss with engagement leader.
- Follow approach agreed to with client on how any additional fees will be communicated.
- Document the additional fees in a memo or change request.
- Solicit the client's approval for any additional fees beyond what was agreed to in the engagement letter.

Effectively manage changes to the service team

- Communicate to the client the need and nature of any changes to the team in a timely and proactive manner
- Share the rationale for the change, and how it will impact the success of the engagement
- Demonstrate the value of the change to the client



Use the client service principles to:

- 1. Understand how to deliver the one-step-ahead client experience;**
- 2. Coach team members on how to deliver client service excellence; and**
- 3. Act on Client Feedback to make it right and delight.**



We will...

MAKE and meet our commitments
to our clients

UNDERSTAND our clients'
business and what's important to
them

PROVIDE value and build trust
through product quality, technical
competence and consistent results

DEMONSTRATE professionalism
through
effective interaction and
communication

PROVIDE a NO SURPRISES
experience

