

# CX: Environment

*Creating a comfortable and clean environment for your clients to meet with you is an important part of your overall client experience. This course will offer best practices for basic environmental elements of office setup and décor.*

By the end of this course, you should be able to gain understanding of the standards for a professional office environment, use your space and furniture to create a comfortable experience for clients, and understand the best practice of implementing calming colors and complimentary decorations.

## Overview:

While we have all been told to not judge a book by its cover, we also know that first impressions are often lasting ones. What kind of impression do your clients and prospects get about your firm as they walk into your office?

There are many components of creating a great client experience, and your office environment is an important part that often gets overlooked over long periods of time. Now, we aren't suggesting that you do a complete overhaul every few years to keep on-trend with your décor, but we do believe that your environment should be reviewed and adjusted as needed.

Just like many other areas of your business and client experience, there are aspects of the environment that are table stakes. Those would be providing a clean, inviting and easily accessible office. Once you have those set, look at the other basic components such as lighting, smell, and temperature.

These are the very foundation for creating an atmosphere that is conducive to your clients being comfortable and relaxed for your important conversations. Clients can often feel stressed and uncomfortable discussing their personal finances. While you can't control that, you do have control over creating an environment that will help them feel comfortable and confident.

Once you have the environmental basics down then you can turn to the other opportunities in your environment that may need to be updated or enhanced. Not sure what those might be? Well, look for some outside opinions. When was the last time you had someone walk through your space and give you feedback? If you haven't been very conscious of your space, or even if you have, there are likely some small tweaks that can be made to enhance the environment to be more client-friendly.

**To maximize the “environment” component of your client experience, go through three steps:**

- **Step 1:** Gain an understanding of the standards for a professional office environment.
- **Step 2:** Use your space and furniture to create a comfortable experience for the clients.
- **Step 3:** Understand and implement what research finds to be calming colors, and complimentary decorations.

There is a great deal of research and information about the best practices to create a positive office environment, and that probably is not your area of expertise, nor should it be. Use this course and our best practices to be sure that you are taking advantage of all the opportunities to build an effective and comfortable environment, not only for your clients, but also for yourself and your team.

Coach Tip: This is only one course of a full menu that covers each component of the overall client experience. For the full CX (Client Experience) picture, see the other CCO courses on:

- *Creating a World-Class Client Experience*
- *Reviews*
- *Onboarding*
- *Service*
- *Education*
- *Communication*
- *Appreciation*
- *Surveys*
- *Technology*
- *Environment (this course)*
- *Service Model*

## **Step 1: Understand the basic standards for an office environment**

Having a clean, inviting and easily accessible office isn't a nice-to-have, it's a must-have. Whether you are looking to completely overhaul your current office, moving into a new space, or just sprucing things up, there are some basics and standards that will promote a comfortable experience for your clients.

Before you do anything, take note of your own personal style and preferences. Look for opportunities to add your personal touch to the office and be sure to consider you and your staff when making any changes. After all, you are going to spend a significant amount of time there.

Some of the basic yet overlooked components of the office environment are the lighting, smell, temperature, privacy and sound. While you may have some limitations based on the building or office space, there are likely some tweaks that you might want to make to set the foundation for a comfortable atmosphere.

Let's breakdown the most basic and non-negotiable components first:

Keep a clean and well-kept space. Make sure windows are clean, blinds are dusted often, and you don't have cracked tiles, etc. Have someone with "fresh eyes" look at your space since we can become blind to our everyday surroundings.

Have tissues, hand sanitizer and trash cans available in the waiting room and any other area where you may be meeting with clients.

Create a comfortable and welcoming waiting space for clients and prospects entering your office. You may want to have a television (avoid playing the news as it may provoke anxiety) or play soft music in this space. Having some type of background noise can provide comfort to the clients. If you have a

front desk area, it can also help to distract from any conversations being held by the team, or with other clients.

Consider providing reading material, or photo books for clients to look at while waiting in the area. Have an assortment of refreshments available, such as water, coffee and tea. This is a great opportunity to go the extra mile and ask the client what their preferred beverage is and record it in your CRM, then offer that to them as they wait.

Make sure the front desk is clear of clutter and that no documents with personal information are in sight – this is especially important as paperwork to be mailed is often left at the front desk.

Having a location that is easy to find is key. Be sure that it has ample parking and is accessible by those with all levels of physical abilities.

## Lighting

While many studies show that using natural light provides a better indoor experience, improves alertness, and facilitates more open dialogue (Source: <https://medwinpublishers.com/EOIJ/EOIJ16000166.pdf>), it isn't always an option. However, if there are options for windows in the client meeting areas, you might consider optimizing that space and benefitting from the natural lighting.

Here a few tips to consider about your lighting:

- If you have an opportunity to have natural light, use it
- Be sure the client's view isn't directly out the window, as it may cause distraction
- Avoid the use of florescent lighting
- When possible, use a combination of both natural and artificial light
- In smaller spaces, such as waiting room areas, be sure to use softer lightening options
- If using a webcam for virtual meetings be sure that you have appropriate lighting available

## Smell

When thinking about using scents, keep in mind that less can be more. People's preferences of smells can vary drastically, and specific smells can also have an effect on people's moods, work performance and emotions (<https://www.scientificamerican.com/article/do-scents-affect-peoples/>). Here are some pointers on using scents in the office:

- If you are going to use a scent, make sure it is subtle
- Common scents used are fruit and baked goods
- Consider the use of fresh flowers as a light scent option and aesthetic décor
- Some advisors have team members bake fresh cookies on days of client meetings, serving as an enticing scent and treat for the client

**COACH TIP:** Don't forget about the use of scents in the form of cologne or perfume. We recommend using very little and subtle fragrances, if any. Additionally, keep some mints on hand for both the staff and the clients!

## Temperature

This basic environment component is not as complex as some of the others. In general, it is recommended to set your temperature in the office in between 70-78 degrees. If your client(s) become cold or warm, offer to adjust the temperature. When at all possible avoid placing furniture that will be sat on directly next to or under the heating or cooling vents in the office, or close to a window that might create a draft or heat. Of course, be sure that the temperature is comfortable for you and your staff.

## Privacy

Giving your clients a private place to meet with you can help create an environment in which they feel comfortable addressing personal conversations that may have them feeling vulnerable. Many offices have glass doors or walls. Ideally the office should have one completely private meeting space. If there is not a private space to hold meetings there are a few adjustments that you should consider making to provide additional privacy.

If the main meeting room being used for client meetings has glass you may want to consider using frosted glass in those areas, or the use of blinds that can be shut during meetings. Another option would be to strategically place tall plants to block the view of those passing by. If you have more than one meeting space be sure to ask the client which room they would prefer to use for the meeting.

## Sound

Providing an environment where clients are comfortable discussing sensitive topics also means that they need to feel confident that their conversations are confidential. Be sure that you are providing a space to meet with clients that has appropriate sound masking. If this is a concern, you might consider sound masking by playing white noise or use a sound machine to create an additional buffer. If you need additional sound proofing measures, consider the following adjustments:

- Adding a rug or thicker carpet
- Use sound proofing paint for the walls
- Place furniture, such as couches in a space to dampen the sounds
- Add larger plants to help absorb noise
- Use acoustic panels on the wall

With more and more advisors holding virtual meetings, the sound between advisors' offices or work areas is also an important component to consider. Be sure that while you are on a virtual meeting, that noise from other offices does not disturb the meeting. The same goes if you find yourself working from home. Be sure to create a space that will have minimal sound distraction.

As more advisors and their teams are embracing the opportunity to work-from-anywhere, here are a few tips to consider when meeting with clients virtually.

- Use a simple or professional background

- Consider using a greenscreen if your background is not client-friendly
- Be very conscious of noise -- what may seem quiet on your end could be distracting to the client
- Use a good web camera and be sure to have the location and angle in a position that would show from about the shoulders up and replicate you if you were physically across from the client

## Step 2: Use your space and furniture to create a comfortable experience for the clients

The financial industry is now more focused on long-term client goals and plans. With these changes the client meetings have also adapted, and in some cases when onboarding new clients, the meetings might take a considerable amount of time.

The traditional office setup for a financial advisor was the advisor sitting behind a desk and the client(s) sitting across from them. While this setup may feel more comfortable for the advisor, it isn't always conducive for creating a relaxed atmosphere to engage with clients about their financial future. Consider creating an inviting, almost living room-like environment to increase the client's comfort.

**COACH TIP:** If you have both an option for a traditional office space to meet with clients and a more relaxed, living room-like environment, ask the client which they prefer to meet in. While studies show clients might favor the relaxed environment, it may not be everyone's preference.

Office furniture plays an important role in the office setup. Check out the [Office Setup Sample](#).

There are many components of the office furniture that you may want to consider, such as:

- Choose furniture that is more of a timeless style, rather than what is on-trend at the time
- If you have many elderly clients be sure that the chairs are not so soft or low that it makes getting out of the chair uncomfortable
- Choose furniture that may be somewhat mobile, should you need to re-arrange the rooms
- If using more of a living room or therapeutic space be sure to have side tables available for beverages and paperwork
- Consider adding a large screen television to the client meeting area to review financial plans and other material with ease

The setup and furniture in the client meeting space is an important factor in providing a comfortable and relaxed atmosphere. Be sure to make these choices with the client's comfort in mind.

## Step 3: Understand the best practices of implementing calming colors and complimentary decorations

There is a whole world of opportunity to add some personality and style to your space with the use of color and décor. Keep in mind that some colors are known for eliciting certain emotions. Because of this, a general rule of thumb for office space is to use more neutral colors for the walls and major

pieces, while adding a pop of color with décor and art. We've created an *Office Color and Design Board Sample* to illustrate some of our best practices below:

- Use lighter and more neutral colors for walls
- Both blues and violets are associated with reducing stress
- Add live plants unless you are unwilling to provide the maintenance. If not, opt for realistic faux plants
- Add artwork that compliments your style, or might make a good conversation starter
- Display any degrees or certifications, but they do not need to be the focus of the décor
- Bring in some of your personality, but stay clear of anything too eccentric
- Have a balanced amount of décor that is easy to dust and clean
- Keep the entire office clean and clutter free

**COACH TIP:** Be sure to seek additional opinions. If you are considering redecorating the office or making any significant changes, run your ideas by your Advisory Council.

## Summary:

Creating the right balance in the environment isn't as easy as you may think, but now that you are finished with this course, you (1) have gained an understanding of the basic standards for an office environment, (2) know how to make the best use of your space and furniture to create a comfortable experience for the clients, and (3) can apply the best practices of implementing calming colors and complimentary decorations to create a comfortable space for your clients.

Remember to keep in mind the complete office as you make any updates or changes. And be sure to consider the exterior environment, from the curb appeal to the ample and easily accessible parking and entrance for people of all abilities.

Invite family, friends or a professional to help offer their opinions about the space. Having multiple perspectives will help ensure you are providing an accommodating space for all clients. And just like other areas of your business, be sure to re-evaluate your environment over time. Bringing in someone with a fresh perspective to look around and point out opportunities for improvements is a great way to make sure you aren't missing anything, since you can get blinded by the environment that you are in regularly.

## FAQs:

- **Should I hire an interior designer?**
  - Delegating work to experts will often allow you to focus more on the areas and functions that are the best use of your time. If your budget allows and you need additional assistance, ask trusted connections for a referral.
- **How upscale does my office need to be?**

- First, consider your ideal clients and your A+ clients. What do you believe is the most comfortable and appropriate environment for them? This is another great time to engage with your Advisory Council before making any major changes. If you can accomplish a comfortable and conveniently located space that is a bit more upscale, and within your budget, go for it. Just know your audience and understand that having a space so upscale may not feel welcoming and relaxed for all clients.

## Resources:

Learn more and download the resources referenced in this document from the [CX: Environment](#) course in Carson Coaching Online.

- **Office Setup Sample**
- **Office Color and Design Board Sample**