Unlocking the future of CX

Grant Thornton's innovative use of AI

Executive summary

Grant Thornton's Head of Insights, Shaendel Hallett, led a transformation in how the firm listens to its clients.

Facing challenges in extracting value from large volumes of feedback, the firm partnered with MyCustomerLens to harness AI-powered analysis.

The collaboration unlocked valuable strategic insights, helping Grant Thornton strengthen its brand positioning and improve CX decision-making.

Problem to be solved

Despite collecting large volumes of client feedback, Grant Thornton struggled to extract strategic insights from unstructured qualitative data. Without a way to efficiently analyse client sentiment and emerging trends, the firm risked missing key opportunities to enhance client relationships. They needed an advanced solution to turn data into actionable intelligence.

The solution

- Cleansing and unifying data from multiple feedback sources to create a single client view.
- Applying bespoke AI to uncover trends and reveal insights hidden in free-text responses.
- Tracking brand perception across different service lines to refine marketing and BD strategies.
- Providing interactive dashboards, allowing teams to discover additional insights in real time.

This collaborative AI-powered approach transformed client feedback data into clear, strategic insights that directly informed decision-making at every level.

Client profile

Grant Thornton is a leading professional services firm with a strong commitment to client experience. The firm's Insights team has developed a market-leading feedback programme, combining surveys and strategic reviews to create CX insights.

Why MyCustomerLens

Grant Thornton selected MyCustomerLens because of its unique ability to combine AI-driven technology with deep professional services expertise. MyCustomerLens offered direct access to real-time analytics, bespoke AI models tailored to Grant Thornton's needs, and a highly collaborative approach.

"MyCustomerLens didn't just provide a tool—they acted as a strategic partner, helping us unlock insights we couldn't access before. The ability to see emerging trends across our firm and track client sentiment at a granular level has been a game-changer."

– Shaendel Hallett, Head of Insights, Grant Thornton

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Since joining Grant Thornton seven years ago, Shaendel Hallett has been on a journey to reposition the value of client feedback, replacing the fear of finding out, with a focus on how the feedback can be used in a positive way.

The company's Head of Insights, who has a 20-year career in customer experience, said: "We have done a lot of work engaging with senior stakeholders, getting buy-in from our CEO and senior leadership team.

The team has set up a market leading customer experience (CX) programme, embraced new technologies and its members continue to look for ways to improve. The key focus is on talking to clients about their experience with Grant Thornton, and understanding their future wants and needs.

Their success has led to the team becoming a pseudo agency, delivering ad hoc research projects for internal teams and even clients.

"It has been really successful and has helped us be perceived as a strategic business partner across the firm" said Shaendel.

An intelligent approach to customer experience

In a desire to continually improve, the team approached MyCustomerLens, a Glasgow-based AI-driven, always-on client listening platform for professional services firms.

The core feedback programme had focused principally on conducting regular online surveys, to provide a quantitative measurement of performance, along with strategic reviews, talking directly to clients to dig deeper into what's on their minds, and giving clients a chance to feedback independently. Shaendel was keen that the programme focused on recognising and celebrating team successes, as well as identifying any improvements.

To assimilate and interpret all of the data, the firm uses Qualtrics, an employee and CX management platform.

Grant Thornton had amassed a large volume of data from data surveys along with a vast amount of qualitative material from client in-depth reviews, it was struggling to extract meaningful, actionable insights.

The unstructured nature of clients' comments often hindered identification of key themes and trends, limiting the programme's effectiveness in informing strategic decision-making.

Implementing a collaborative programme

The aim of working with MyCustomerLens was to test the benefits of using AI to analyse structured and unstructured text data and to discover how AI analysis could help expand the team's impact and inform the firm's evolving client insights programme.

Shaendel felt there was an opportunity to enable more powerful storytelling, which would shape commercial decision-making and improve CX.

"Our question was how do we do more with the feedback? Particularly with the qualitative data, we weren't able to thematically pull out the key insights from it, both at a firm wide level, but then looking at service lines as well" said Shaendel.

A secondary goal was to leverage the data to show how clients perceive the Grant Thornton brand, to better inform how the firm delivers on its brand, BD and marketing strategies.

"I was just really impressed with the expertise and knowledge base and the tools and tech that they had available," she said. "And so, when I was thinking about this gap that we had in our understanding, Paul and MyCustomerLens were the first port of call to really kind of flesh out the idea."

The project started with data cleansing, ensuring there was consistency across various data sources, to lay the foundation for effective AI analysis.

MyCustomerLens then leveraged its AI capabilities to analyse unstructured text data from the strategic reviews and online surveys, identifying key themes and trends that would have been difficult, if not impossible, to detect through manual analysis.

A significant element of the project involved customising the AI algorithms to track and understand client perceptions across different facets of the Grant Thornton brand. This granular analysis allowed for a more nuanced understanding of the firm's brand positioning and resonance with its client base.

MyCustomerLens provided Grant Thornton with direct access to the analytics, allowing its team to review emerging findings and recommendations. This contrasted with the approach typically employed by some agencies who want to retain control over the analytics process, often sharing only summary reports.

Weekly meetings, document sharing and open communication were integral to the ongoing, collaborative process, ensuring there was proper alignment and continuous feedback between MyCustomerLens, as service provider, and Grant Thornton as client.

The final report was delivered in a series of interactive dashboards, allowing Grant Thornton to continue analysing, and reporting on, the data after the project was finished. This dynamic approach helped to facilitate ongoing insight discovery and a deeper understanding of Grant Thornton's client base.

Unlocking insights into strategy and operations

The project unlocked previously unknown insights, informing decision making and strategy at all levels. It also offered valuable new information about the company's brand positioning strategy.

Its scope, as outlined by Shaendel, was two-fold: "One was looking back at the data. So, what is that data telling us and where are those kind of key themes and what can we do differently as a result of that?

"And then looking forward in terms of what are we missing from our programme? What would the future, what could the future look like for us if we could do anything."

This encompassed a retrospective analysis of existing data, to identify key themes and actionable insights, as well as a prospective component which focused on optimising Grant Thornton's future client feedback programme. The volume of data, while substantial for a professional services firm, paled in comparison with datasets typical of B2C companies.

The collaboration was not a typical consulting engagement, but more of a partnership focused on iterative development and co-creation.

MyCustomerLens CEO, Paul Roberts said: "This wasn't a theoretical research exercise. We were able to work alongside Shaendel and Emily to ensure that we were generating insights that were relevant and actionable."

Shaendel echoed these thoughts saying "It was great to work with people who have customer experience expertise, and having an extra pair of eyes looking over our data was really valuable.

"MyCustomerLens took the time to understand like the structure of our firm…and made sure that they got the details right as well. So that when they did the analysis, the right kind of messages were coming through.

"This collaborative spirit ensured that the insights delivered were not just statistically sound but also deeply relevant and actionable within Grant Thornton's specific context."

The relevance and impact of this project has also been recognised by the Managing Partners' Forum. Grant Thornton has been shortlisted in the Excellence in Client Service category at the 2025 Professional Services Management Excellence Awards.