Using EFM Technology to Create a Superior Customer Experience

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2:00 pm ET / 11:00 am PT
Featured Speakers

Matt Inman  
Senior Director, CX Strategy & Design Consulting

Stacey Nevel  
Director, Customer Experience Management

Bill Bradley  
VP, Marketing & Business Development

Maritz CX

Confirmit
CEMDNA Playbook Strategy℠
CX Technologies

GOAL
ACQUIRE – RETAIN – GROW – WINBACK
Are We Measuring CX Accurately?

Matt Inman
Senior Director, CX Strategy & Design Consulting
Where we have succeeded
Measuring the voice of the customer
Are we measuring CX accurately?

- Knowledge of Representative
- Avg. Handle Time
- Courtesy of Representative
- Customer ease
Is it fair to measure CX this way?

- Lack tools/information
  Can’t see what customers see

- Lack resources
  Can’t answer questions easily

- Lack authority
  Can’t do what customers ask

- Lack rewards/recognition
  No incentives

- Don’t understand customer needs
  No access to VOC info.
The Impact of a Comprehensive Approach to CX

87% of companies are here.

Apathetic
Investigate
Measure
Respond
Solve
Align
Enculturate

Financial Performance
Customer Retention
Where EFM Technology Can Help

- Apathetic
- Investigate
- Measure
- Respond
- Solve
- Align
- Standardize
- Case Management
- VOC Dashboards
- Action Planning
- Data Analytics
- Text Analytics
- Enculturate
Dashboards
Impact of having access to data

I Have Access to a VoC Digital Dashboard

- Global Avg.:
  - 10%
- CX Leaders:
  - 41%

- Strongly Agree: 30%
- Agree: 41%

Info. From CX System is Continuously/Widely Shared

- Global Avg.:
  - 10%
- CX Leaders:
  - 46%

- Strongly Agree: 36%
- Agree: 44%
What to Consider When Building a Dashboard

Objectives:

• High level company results
• Individual level results
• Trending results
• Prioritizing of improvement efforts
• Seeing customer comments
• Benchmarking against peers-regions-segments/company
• Data analysis
• Mobile access
• Integrating data from other VoC sources or operational-demographic data
Get the Right Info to the Right People

Right Data to the Right Person at the Right Time

Front Line
- Individual Performance
- KPI Transparency
- Customer Feedback

Manager
- KPI Distribution
- Key CX Drivers
- Improvement Opportunities

Executive
- KPI Enterprise View
- Performance Trends
- Improvement Priorities
Out of 173.1 octillion possible combinations in your data, we found 28 interesting patterns with a high potential to Churn.

604 respondents answered:

- Appreciates relationship is 2 or less
- Received updates is 2 or less

And they were 3.6x or 59.9% more likely to churn

Data Analysis Spotlight

Respondents who fit this pattern were 3.6x or 59.9% points more likely to be in the “Churn” segment than the general population (10,566 respondents).
Data Analysis: Spotlight Overview

• Insight tool
• Identifies patterns
• Patent for speed
• Uses any data
  – Rank, category, numeric
Spotlight: How it works

Friendliness >= 9 and Wait Time < 2 mins. are 83% likely to be Satisfied
Turning VoC into $$$

Breakfast Linkage

Diners who experience
Overall Sat &ge; 9
are 38.7% likely to be a
repeat customer.

Increasing ‘Satisfaction’ top 2 box by 10%
will increase repeat business by 3.9%.

For a $1 billion restaurant chain 4% = $40 million
Case Management
How Does Case Management Work?

1. **Receive Customer Feedback**
   - You receive customer feedback through a survey, text analysis, social media, or some other channel.

2. **Automatic Triggers**
   - The customer’s response automatically triggers the creation of a new case—based on pre-determined rules and thresholds.

3. **Case Owner Identified**
   - An appropriate case owner is identified and notified via email with instructions for resolving the issue.

4. **Document the Response**
   - The case owner contacts the customer and documents the response—including the root cause of the issue.

5. **Identify Opportunities for Improvement**
   - Insights from the conversation are aggregated with other information, carefully analyzed, and fed back into your CX system to identify trends and opportunities for improvement.
Case Management Features

Case Creation, Assignment & Follow up

- Case creation
  - What are my alerting priorities?
  - Triggering from Text Analytics output?
  - Allow analysts to manually create cases?

- Case actions
  - Initial notification and assignment
  - Follow up actions
    - Reminders
    - Escalations
    - Status changes

Customized Notifications

- Assignment
- Reassignment
- Reminders
- Status change
- Escalations

Creating an Effective Inbox

- Caseworker’s To-do list
- Help them easily prioritize
- Contains columns from both Case and Response data
- Don’t forget mobile

Reporting: How am I Doing Closing the Loop?

What exceptions require attention?
**Action Planning**

Respond at the organizational level
What does this look like on 100 customers?
MaritzCX Action Planning

**Do more than identify opportunities for improvement…take action!**

- Identify CX Improvement Opportunities
- Investigate Root Causes
- Create a Plan of Action
- Update Plan at Key Milestones
- Follow Through on Commitments
- Evaluate Results

Action Planning
# Action Enable the Data

## PRIORITIES FOR IMPROVEMENT

<table>
<thead>
<tr>
<th>Metric</th>
<th>My Score</th>
<th>Area Score</th>
<th>Delta</th>
<th>Priority</th>
<th>Action Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledgeable staff</td>
<td>71.0</td>
<td>72.5</td>
<td>-1.5</td>
<td>1</td>
<td>Create Action Plan</td>
</tr>
<tr>
<td>Post sales follow up</td>
<td>68.4</td>
<td>69.7</td>
<td>-1.3</td>
<td>2</td>
<td>Create Action Plan</td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## MY ACTION PLANS

<table>
<thead>
<tr>
<th>Plan Name</th>
<th>Focus Metric</th>
<th>Owner</th>
<th>Target</th>
<th>Start</th>
<th>Target Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rotating mentorship program</td>
<td>Knowledgeable staff</td>
<td>Janice Reynolds</td>
<td>75</td>
<td>July 15, 2016</td>
<td>Aug 31, 2016</td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Creating and Editing an Action Plan

## 3. Proposed Solution

**Describe plan of action**

We are going to divide up the delivery of one-on-one training between the sales manager and two performing sales staff. Each will deliver two, roughly 60 minute training segments to those assigned to them over the course of the next month. We’ll do this over lunch, which the dealership will pay for. The trainer and the trainee will agree on the dates and times. The first session will cover the introduction of the subject matter and...

## 4. Updates and Workflow

<table>
<thead>
<tr>
<th>Created date: Apr 22, 2016 5:50 PM</th>
<th>Target Completion Date: 09/30/2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completion date:</td>
<td>Plan Status: In Progress</td>
</tr>
</tbody>
</table>

**Workflow Step**

- **Approved**

**Enter comments related to a workflow step change**

Plan looks good overall. Please update the plan (in the notes) with the name of the sales person and completion date of their training for each task.

**Plan Updates**

Enter notes and updates as needed as the plan progresses.

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**ADD NOTE**

Joseph Rice updated comment on Jul 11, 2016 3:26 AM

plan ready for approval
Track individual Plans & Rolled Up Progress Reports
View and Update Plans on the Go
Remove Barriers, Empower Action & Drive Change

Stacey Nevel, Director
Customer Experience Management
Confirmit in Brief

The leader in VoC and Market Research solutions

- Deliver to 800+ customers in 100+ countries
- Clients include the world’s largest research companies, consultancies, and leading financial services organizations
- 100+ R&D members, all with a continuous development cycle

180M completed surveys in 2015. 10 million questionnaire pages delivered per day

100% uptime percent in 2015

75M report page views by execs and managers in 2015

400+ staff worldwide

1996 year founded
Richer insights
- Listen across all your customers’ preferred channels
- Deliver a more engaging respondent experience
- Capture and map all insights in one central hub

Smarter decisions
- Provide predictive analytics capabilities
- Quickly deploy powerful dashboards
- Deliver relevant insight for all stakeholders on all devices

Faster reactions
- Instantly analyze feedback
- Immediately identify potential issues using alerts
- Easily assign and track actions.
Five Facets of VoC Maturity

1. Create Vision
2. Draw Design
3. Drive Action
4. Grow Culture
5. Show Value
“Vision is not enough, it must be combined with venture. It is not enough to stare up the steps, we must step up the stairs.”

- Vaclav Havel
What are the Biggest Barriers to Action?

- Collect consumer feedback: 90%
- Alert staff to findings: 50%
- Make decisions using insights: 30%
- Deploy improve: 10%
- Inform customers of change: 5%

What are the Biggest Barriers to Action?
What are the Biggest Barriers to Action?
Barrier = Culture
Culture: Just What Makes That Little Old Ant...

Break down silos

Engage the business

Empower for action
Break down data silos that **negatively** impact your customer experience.
Engage the Business

1. Share feedback
2. Create employee advocates
3. Celebrate success
Empower for Action

1. Close the loop
2. Be strategic
3. Innovate
Barrier = Listening
Barrier = Listening
How do we Encourage Feedback?

- **WHO** do we listen to?
- **WHEN** do we listen?
- **HOW** do we listen?
How do we Engage With the Customer?

- App
- Web
- SMS
When do we Engage With the Customers?

Source: McKinsey Customer Experience Practice
Using the Right Channel

- **Web**: Email / Overlay
- **Mobile**: Web / SMS / App
- **In Person**: Interview / Kiosk / Paper
- **Phone**: Interview / IVR
- **Social Media**: Social Networks
- **Integration**: Data Feeds
Managing Unstructured Feedback
Barrier = Data Overload
Act

- Closed Loop – Tactical
- Strategic Drivers
Differentiate Conversations Based on Customer Attitude

Super Promoters
- Engage at a truly personal level, individual by individual (no automated communications)
- Involve in future marketing, product development, sourcing, etc.

Promoters
- Identify the reasons and sources of their promotion, which help fuel future marketing campaigns
- Give them tools to actually promote (stories to tell, gifts to give…)

Passives
- Ensure that the passives know what drives the promoters, i.e. highlight what is good and positive
- Capture if they just want to be left alone (lest they might turn into detractors)

Detractors
- Based on root cause analysis engage early and on the topics that matter most
- Show that you actually listen and are serious to resolve issues – i.e. list current issues on the website

Brand Terrorists
- Engage directly and personally to resolve their issues, see what it takes to stop them from damaging you
- Turn them into ambassadors – also internally, to teach the organization how to stop creation of ‘terrorists’
# Understanding the Root Cause

## Key Drivers of Overall Satisfaction

<table>
<thead>
<tr>
<th>Key Vulnerabilities</th>
<th>Key Advantages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Comfort 47</td>
<td><strong>1</strong> Check-in 1</td>
</tr>
<tr>
<td><strong>2</strong> Heating/cooling in room 29</td>
<td><strong>2</strong> Hospitality 2</td>
</tr>
<tr>
<td><strong>3</strong> Cleanliness 19</td>
<td><strong>3</strong> Quality of service 4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Potential Vulnerabilities</th>
<th>Potential Advantages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Housekeeping services 14</td>
<td><strong>1</strong> Menu Variety 14</td>
</tr>
<tr>
<td><strong>2</strong> Decor 12</td>
<td><strong>2</strong> Quality of beverage 12</td>
</tr>
<tr>
<td><strong>3</strong> Condition of rooms 11</td>
<td><strong>3</strong> Quality of food including ingredients, flavor, temperature, and presentation 11</td>
</tr>
</tbody>
</table>
Monitoring the Action

Not enough ‘just’ to take action...
Action Drives Results

**Insurance**
- **93%**
- Revenue retention rate
- Improve revenue from new and existing customers

**Consumer Electronics**
- **12%**
- Reduction in customer defections
- Increase employee retention

**Packaging & Logistics**
- **40%**
- Reduced annual contact center turnover
- Reduce customer churn rates

**Medical Devices**
- **15%**
- Improved timeliness of problem resolution
- Optimize business processes

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“Things may come to those who wait, but only the things left by those who hustle.”

- Abraham Lincoln
Thank You! Q & A

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Requests for Information

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