



## WEBCAST SERIES

# Using EFM Technology to Create a Superior Customer Experience

August 25, 2016  
2:00 pm ET / 11:00 am PT



# Featured Speakers



**Matt Inman**  
Senior Director, CX Strategy  
& Design Consulting

Maritz **CX**



**Stacey Nevel**  
Director, Customer  
Experience Management

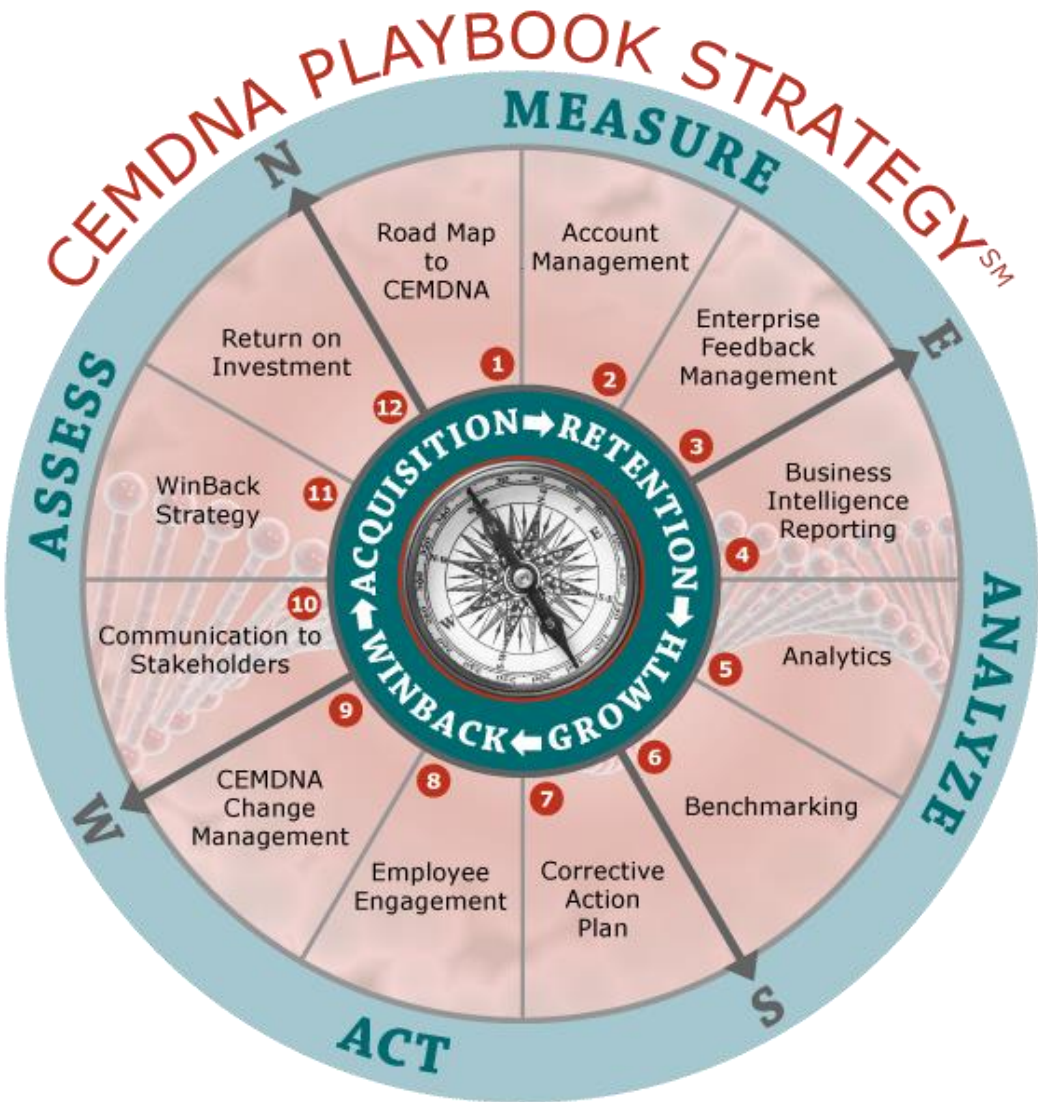
  
Confirmit.



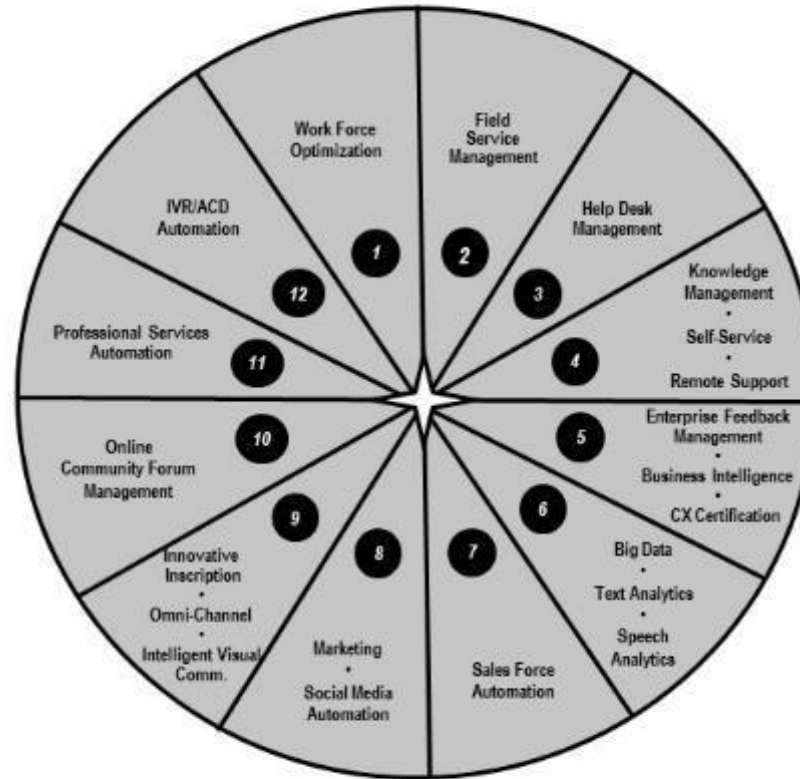
**Bill Bradley**  
VP, Marketing & Business Development

**ΩMEGA**  
Management Group Corp.

# CEMDNA Playbook Strategy<sup>SM</sup>



# CX Technologies



**GOAL**

ACQUIRE – RETAIN – GROW – WINBACK

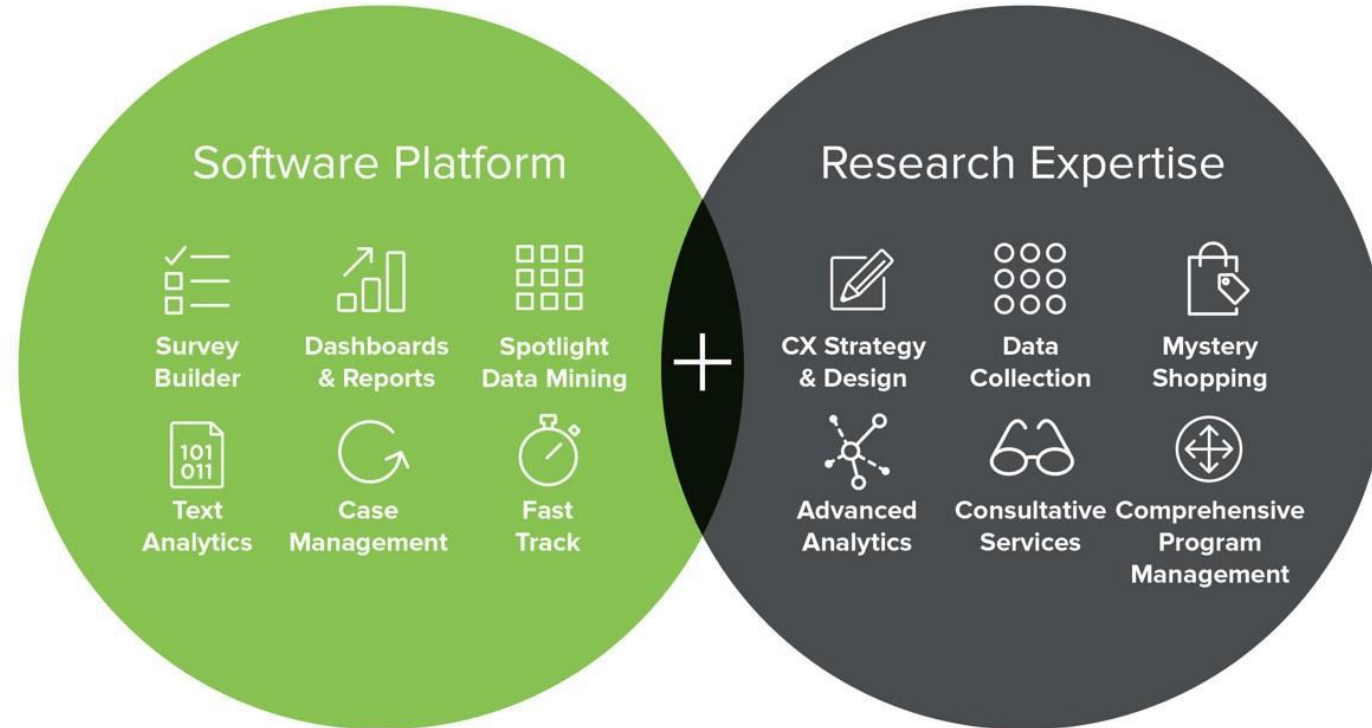
# Are We Measuring CX Accurately?



Matt Inman  
Senior Director, CX Strategy  
& Design Consulting


Maritz **CX**






  
**900+**  
**Fulltime Employees**

  
**18**  
**Offices**

  
**500+**  
**Clients Around the World**

  
**100**  
**Countries**

  
**60**  
**Languages**

  
**1 million**  
**Users**

# 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



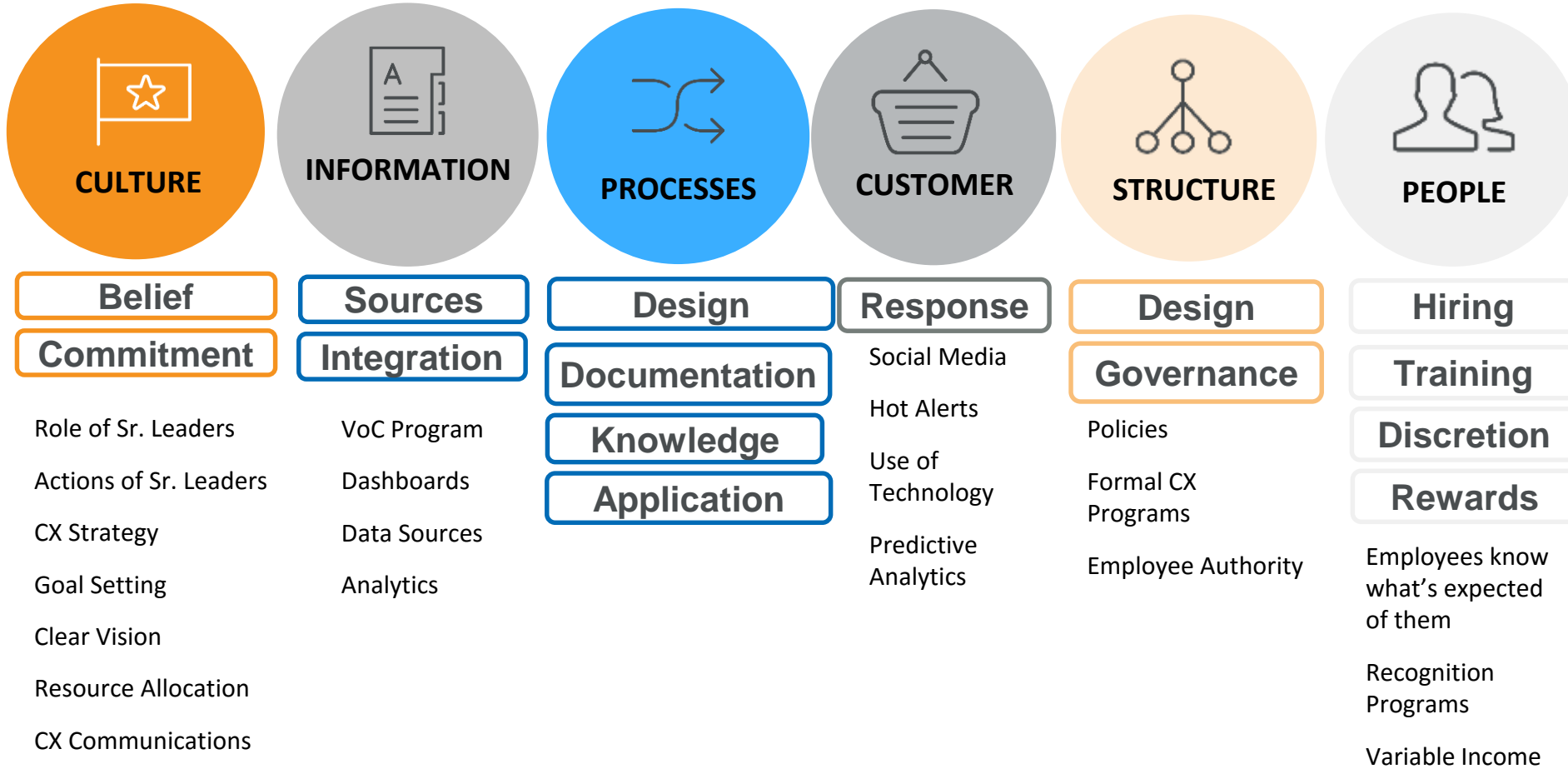
# Is it fair to measure CX this way?



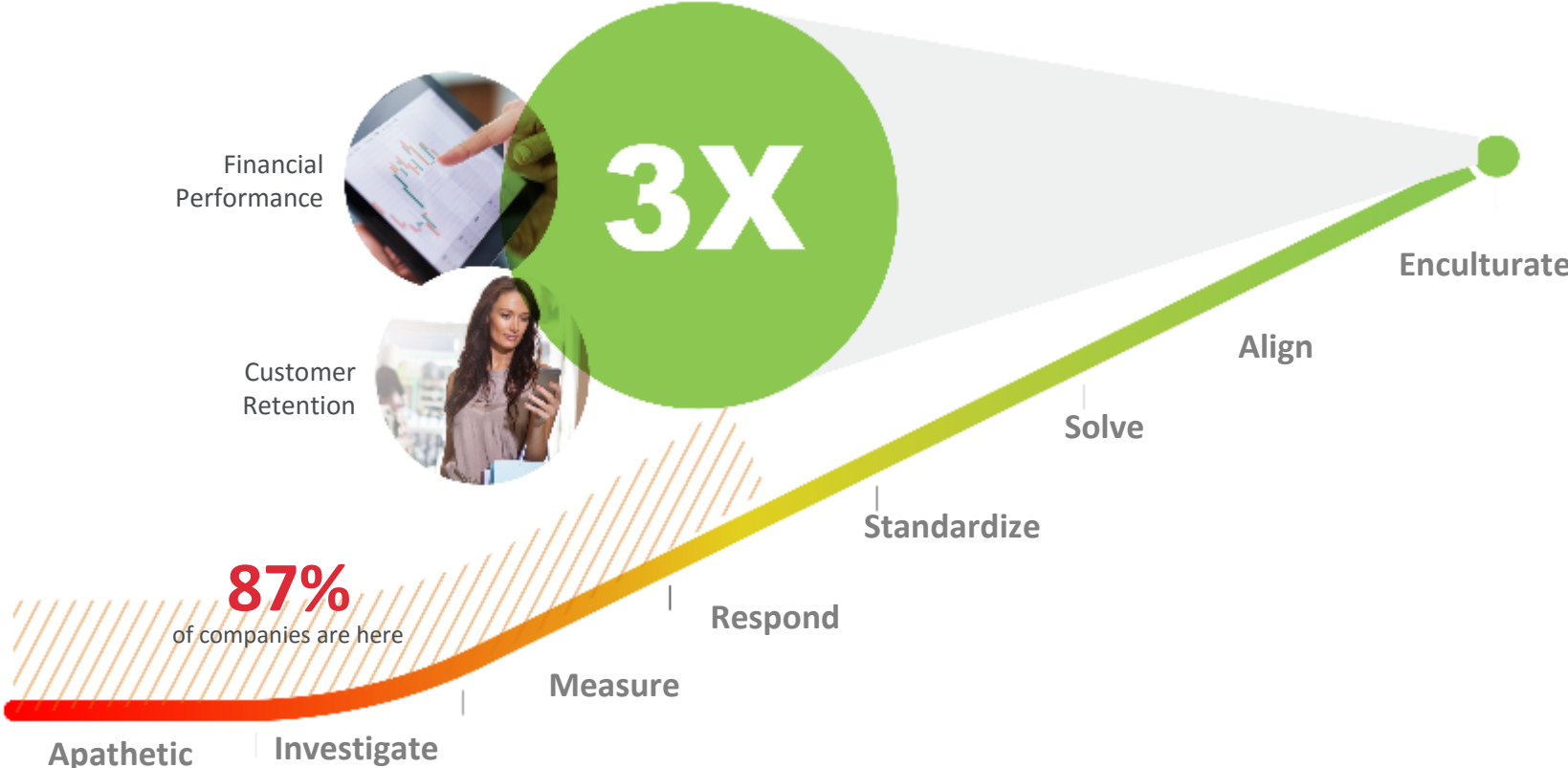
- **Lack tools/information**  
*Can't see what customers see*
- **Lack resources**  
*Can't answer questions easily*
- **Lack authority**  
*Can't do what customers ask*
- **Lack rewards/recognition**  
*No incentives*
- **Don't understand customer needs**  
*No access to VOC info.*

# CX Evolution™

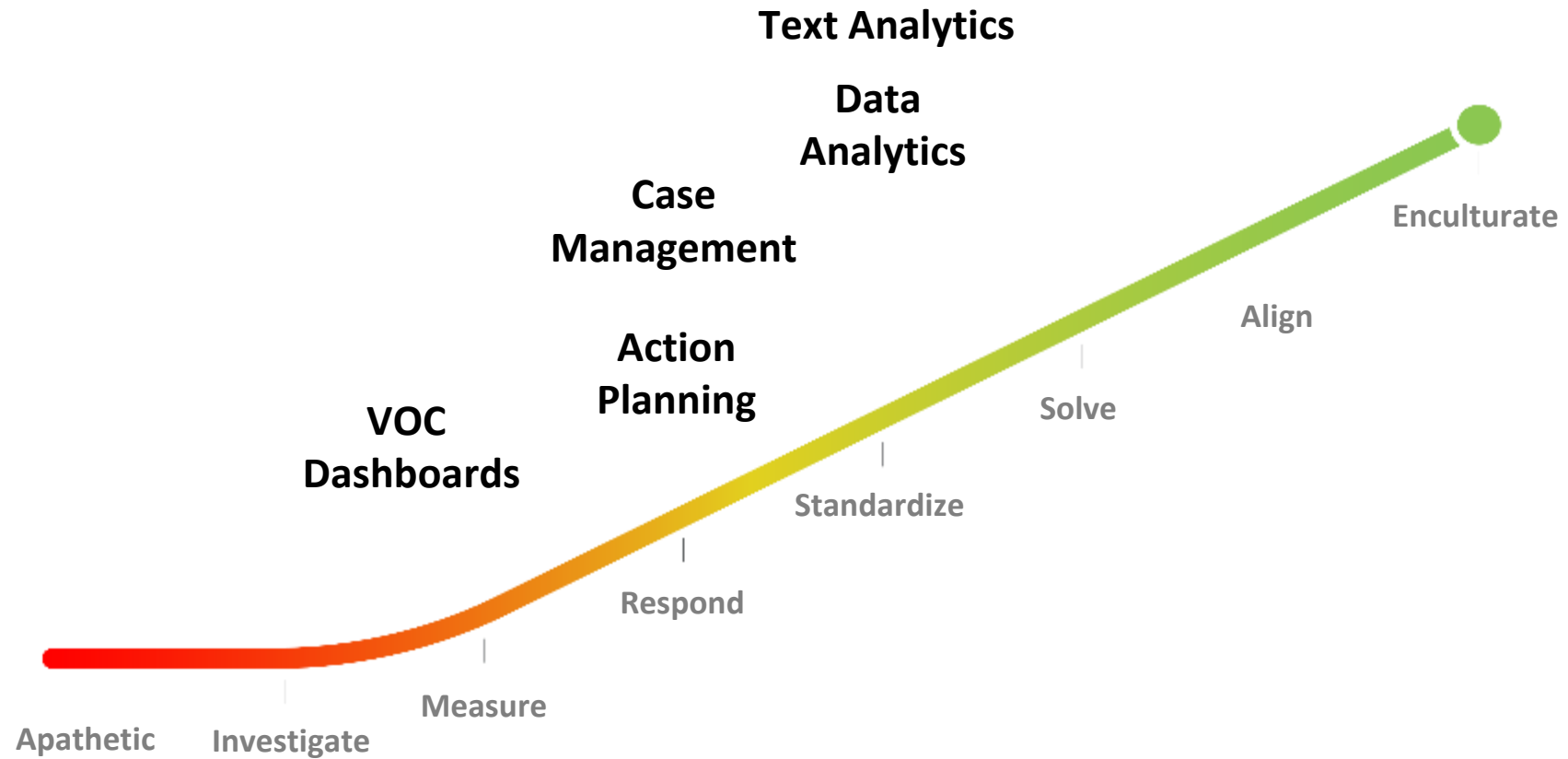
MATURITY MODEL & ORGANIZATIONAL ASSESSMENT



# The Impact of a Comprehensive Approach to CX

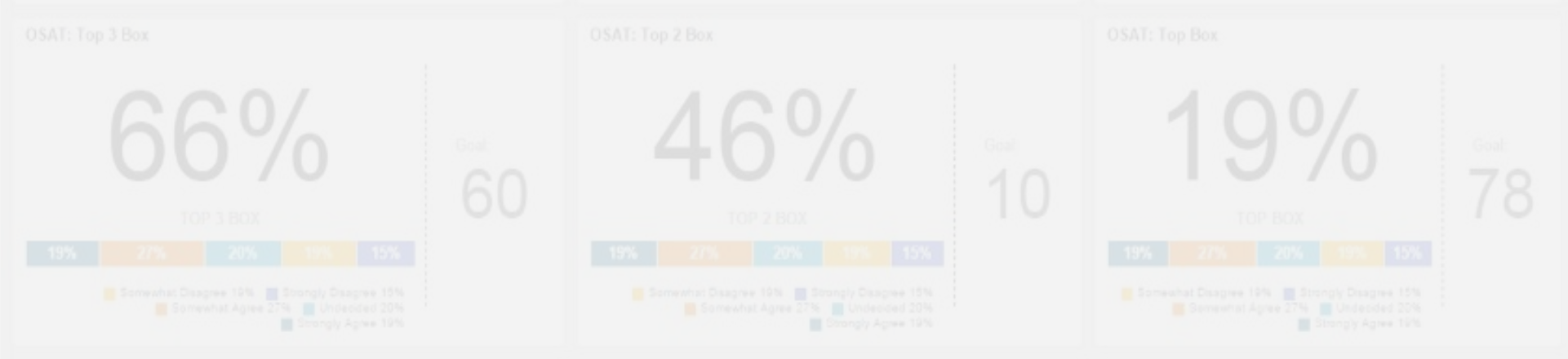


# Where EFM Technology Can Help



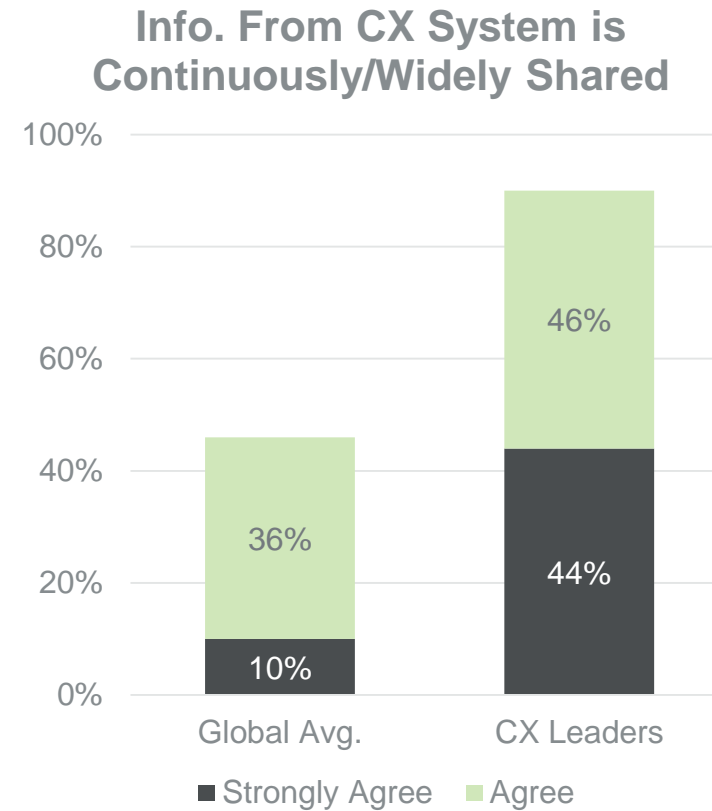
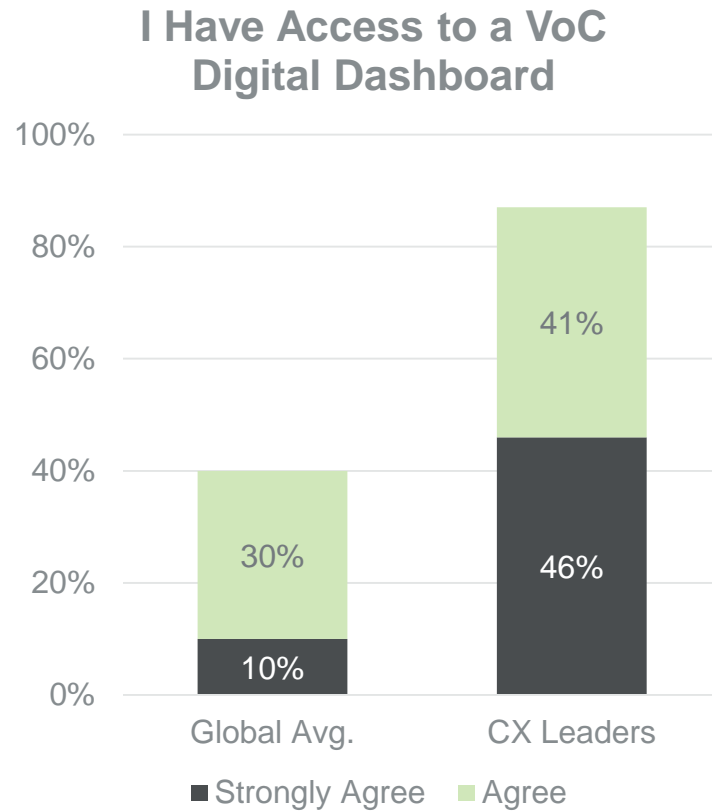


# Dashboards





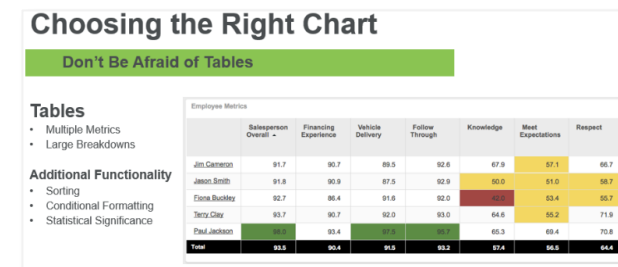
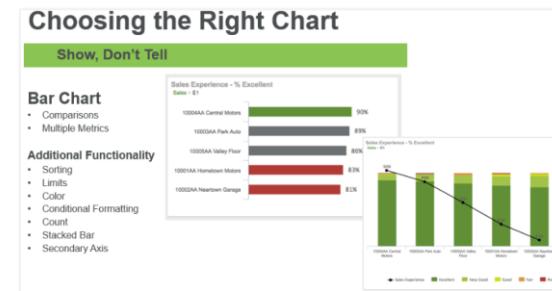
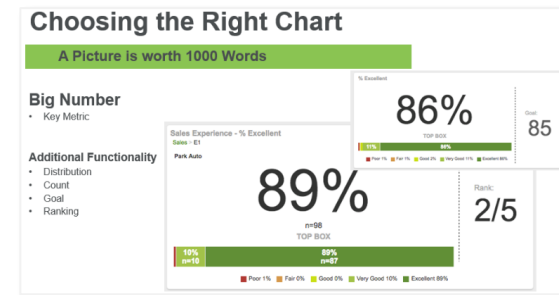
# Impact of having access to data



# 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



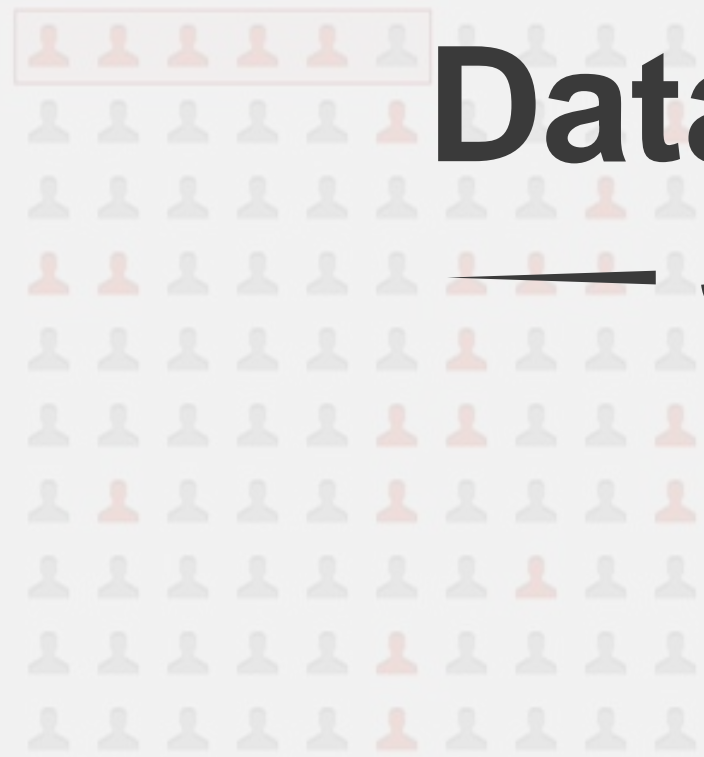
- KPI Enterprise View
- Performance Trends
- Improvement Priorities

ft ▾ Coverage ▷ Accuracy ▷ Out of 173.1 octillion possible combinations in your data, we found 28 interesting patterns with a high potential to Churn. Export

LIFTED PROPENSITY  
IN PATTERN 83.3%  
BASE 23.3%

604 respondents answered:  
Appreciates relationship is 2 or less AND Received updates is 2 or less

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



# Data Analysis Spotlight

This Pattern | General Pop.

CHURN

33.3% | 23.3%

503 | 2,466

10,566

SUMMARY

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).

Expo  
Filter in Standa

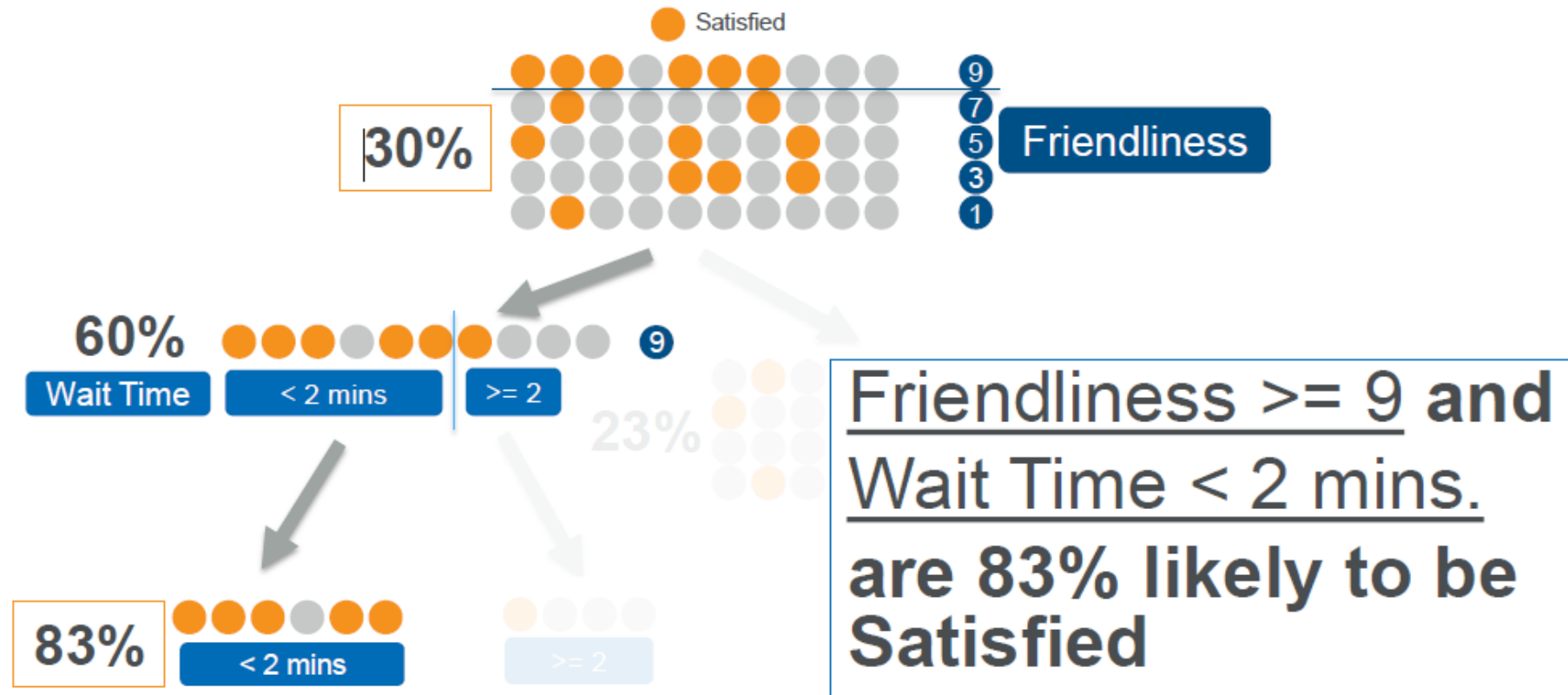
# Data Analysis: Spotlight Overview

- Insight tool
- Identifies patterns
- Patent for speed
- Uses any data
  - Rank, category, numeric





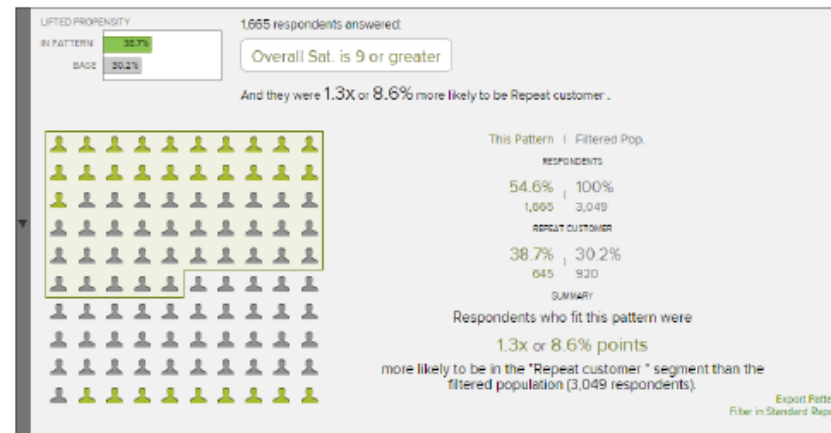
# Spotlight: How it works



# Turning VoC into \$\$\$

## Breakfast Linkage

Diners who experience **Overall Sat  $\geq 9$**  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 Index

Filter

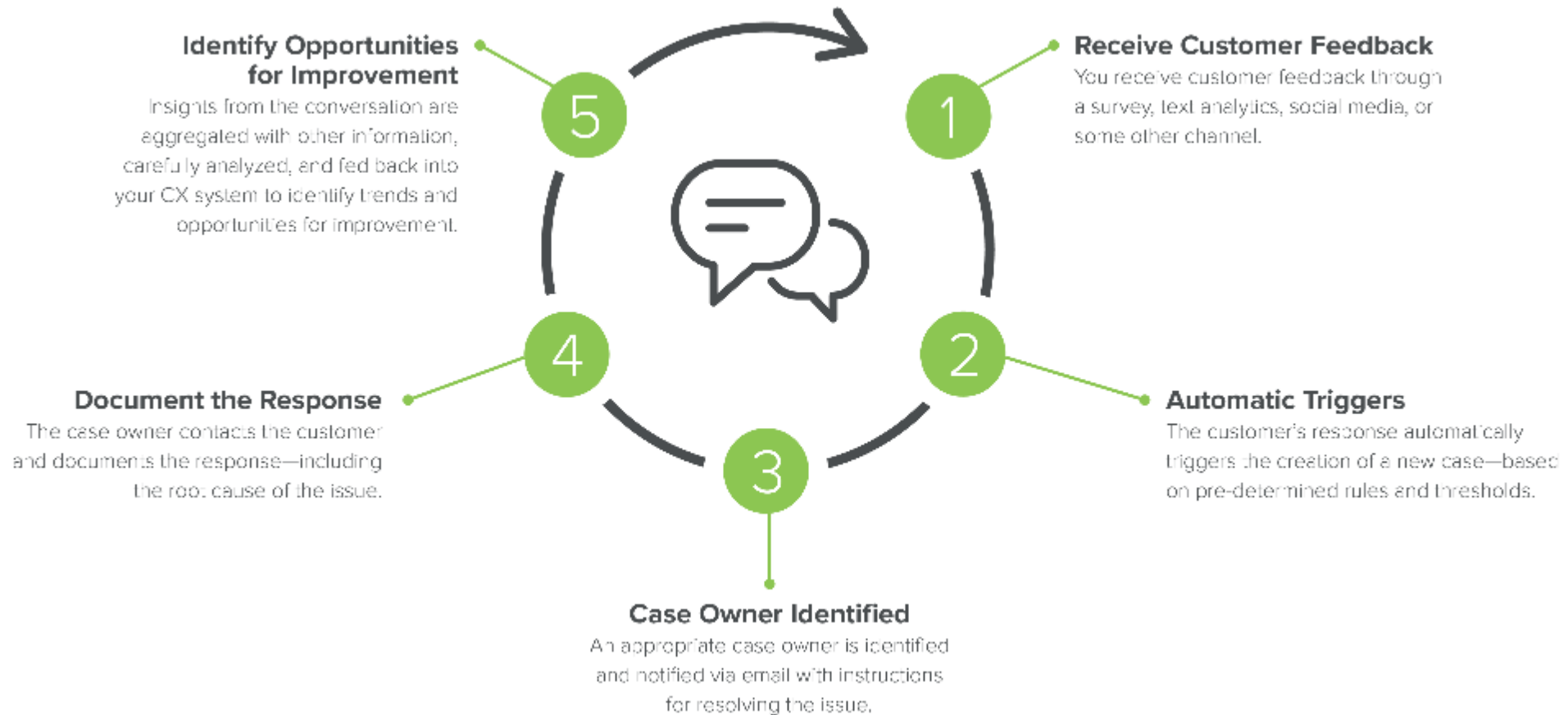
Date Range



# Case Management

Case ID	Asset Name	Property	Status	Case Time to Respond	Case Time to Close	Owner	Closed Date
170	Customer is a Detractor	Comfy Inn	Closed	-1 d 0 h	2 d 4 h	Bryan Rhodes	4/3/2015 12:24:39 PM
171	Customer is a Detractor	Sleepmore Suites	Closed	0 d -11 h	1 d 0 h	Bryan Rhodes	4/3/2015 12:25:51 PM
176	Customer is a Detractor	Comfy Inn	Closed	0 d -11 h	1 d 0 h	Bryan Rhodes	4/2/2015 10:55:22 AM
140	Customer is a Detractor	Comfy Inn	Closed	0 d -11 h	1 d 0 h	Bryan Rhodes	4/2/2015 10:55:22 AM
177	Customer is a Detractor	Red Up Motel	Closed	0 d -10 h	2 d 17 h	Bryan Rhodes	4/3/2015 12:25:04 PM
178	Customer Requests Co.	Sleepmore Suites	New	-24 d 0 h	-21 d 0 h	Bryan Rhodes	
141	Customer is a Detractor	Sleepmore Suites	In Progress	-15 d 0 h	-22 d 0 h	Bryan Rhodes	
126	Customer Requests Co.	Comfy Inn	In Progress	1 d 0 h	-23 d 0 h	Bryan Rhodes	
142	Customer is a Detractor	Sleepmore Suites	New	-26 d 0 h	-22 d 0 h	Matthew Campbell	
143	Customer Requests Co.	Comfy Inn	Closed	-4 d 0 h	0 d -22 h	Bryan Rhodes	4/2/2015 5:54:34 PM
179	Customer Requests Co.	Sleepmore Suites	Closed	-1 d 0 h	2 d 4 h	Bryan Rhodes	4/3/2015 12:19:33 PM
21	Contact Me	Phoenix	Closed	-78 d 0 h	-75 d 0 h	Pat Harker	4/2/2015 5:39:40 PM
33	Contact Me	Phoenix	Closed	-3 d 0 h	-42 d 0 h	Corey Harker	4/2/2015 5:35:20 PM
107	Customer Requests Co.	Stay n Play Resort	In Progress	1 d 0 h	-23 d 0 h	Bryan Rhodes	
144	Customer is a Detractor	Stay n Play Resort	Closed	-5 d 0 h	-1 d 0 h	Bryan Rhodes	4/2/2015 5:56:55 PM

# How Does Case Management Work?



# Case Management Features

## Case Creation, Assignment & Follow up

Alert Name	Survey	Active	Cases	Process Order
Detractor	Relationship	Active	0	1
Contact Me	Relationship	Active	0	2
Platinum Customer ...	Relationship	Active	0	3

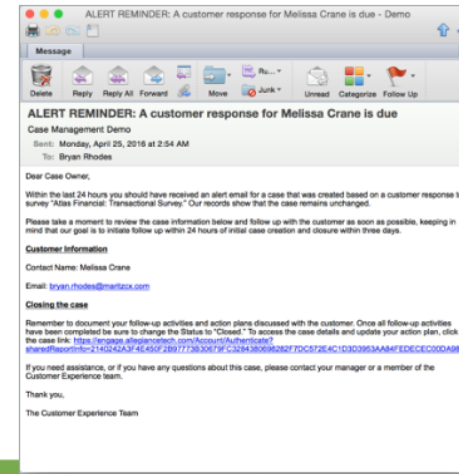
### Case creation

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

### Case actions

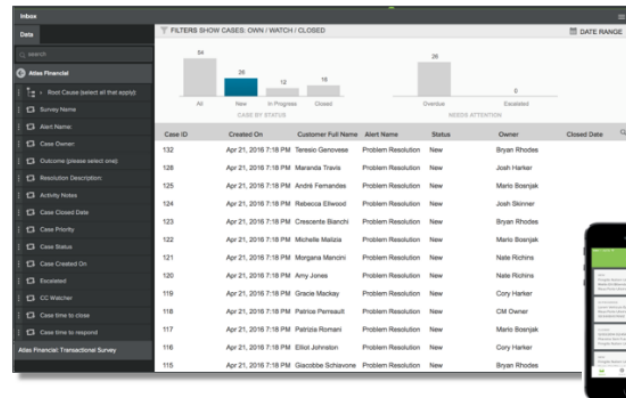
- Initial notification and assignment
- Follow up actions
  - Reminders
  - Escalations
  - Status changes

## Customized Notifications



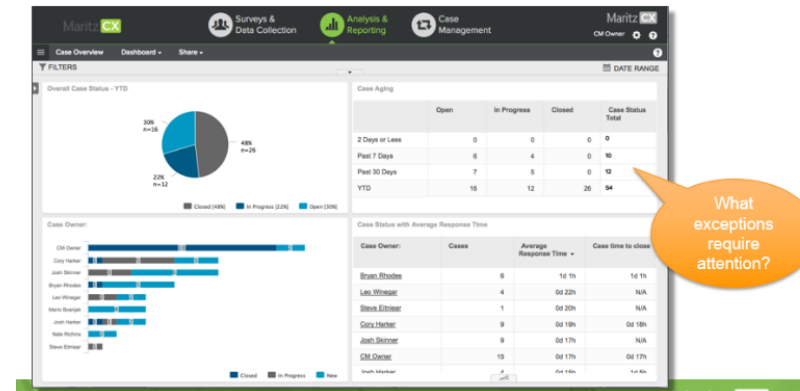
- Assignment
- Reassignment
- Reminders
- Status change
- Escalations

## Creating an Effective Inbox



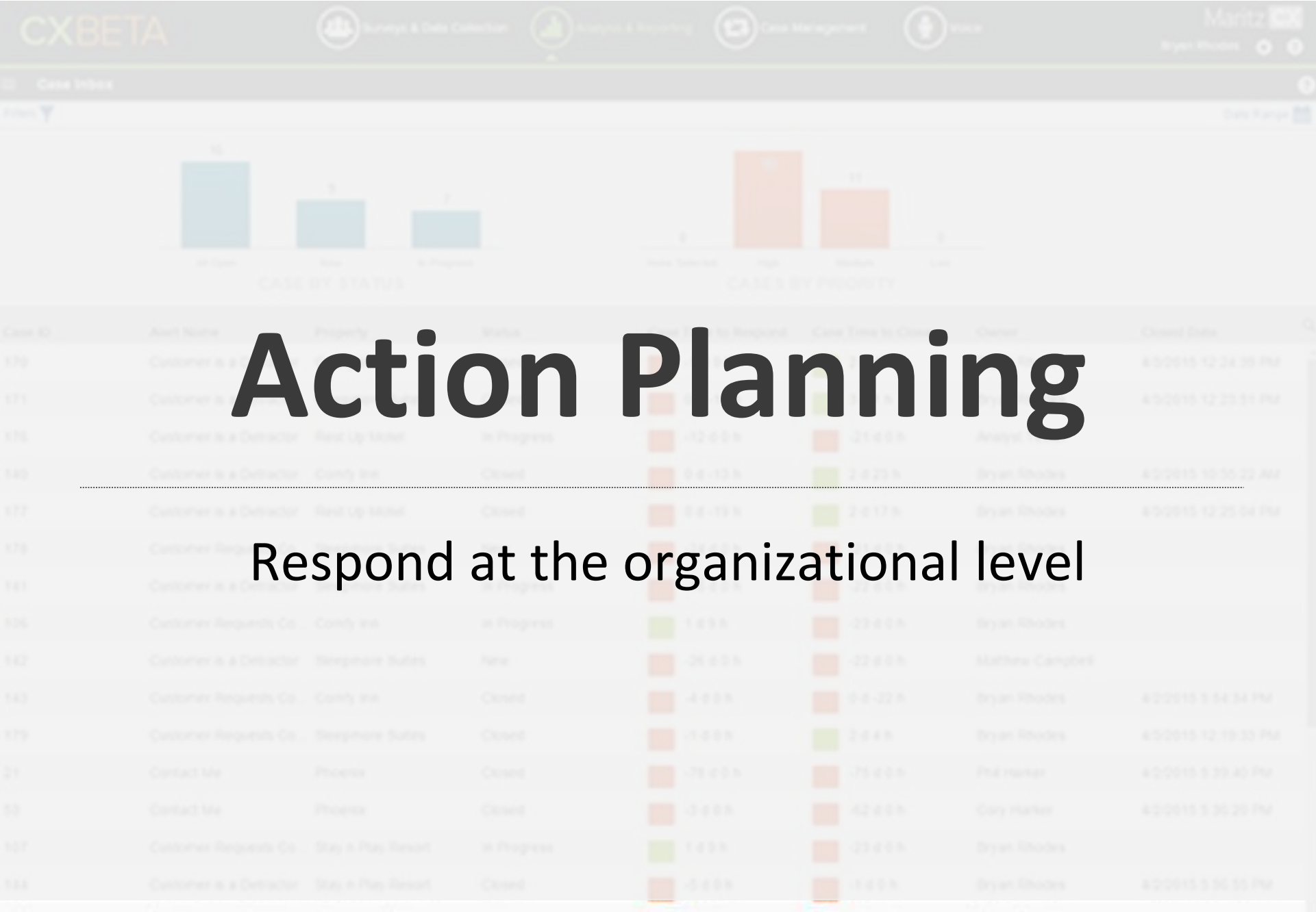
- Caseworker's To-do list
- Help them easily prioritize
- Contains columns from both Case and Response data
- Don't forget mobile

## Reporting: How am I Doing Closing the Loop?



What exceptions require attention?

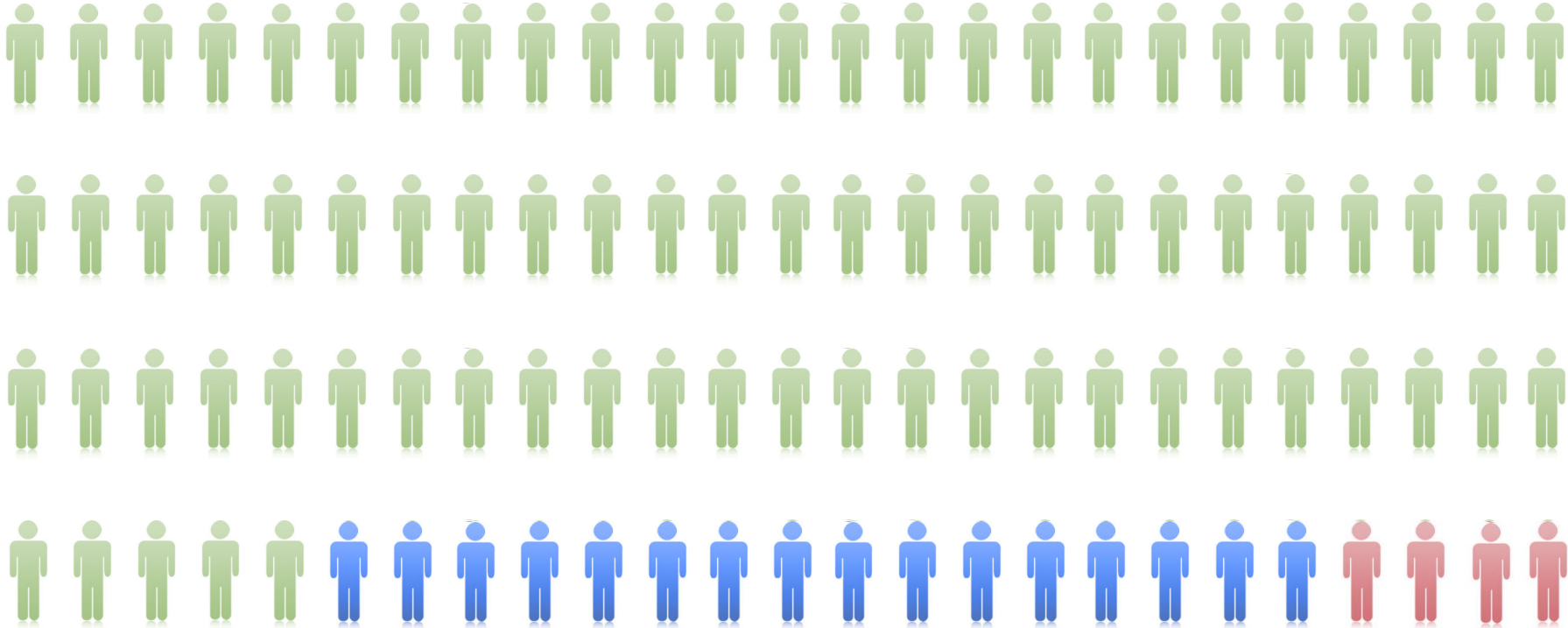




# Action Planning

Respond at the organizational level

# What does this look like on 100 customers?



**SYMPTOMS**



**CASE MANAGEMENT**

# MaritzCX Action Planning



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

# Action Enable the Data



Action Owner

## PRIORITIES FOR IMPROVEMENT

Metric	My Score	Area Score	Delta	Priority	
Knowledgeable staff	71.0	72.5	-1.5	1	<a href="#">Create Action Plan</a>
Post sales follow up	68.4	69.7	-1.3	2	<a href="#">Create Action Plan</a>
Etc.					

## MY ACTION PLANS

Plan Name	Focus Metric	Owner	Target	Start	Target Completion
Rotating mentorship program	Knowledgeable staff	Janice Reynolds	75	July 15, 2016	Aug 31, 2016
Etc.					



# Creating and Editing an Action Plan



Action Owner

Surveys & Data Collection | Analysis & Reporting | **Action & Alerting**

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**Plan Name**  
Rotating Mentorship Program

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Focus Metric: Knowledgeable staff | Start Score: 71 | Target Score (Goal): 75

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**Instructions**

Step 1: identify the plan team. [Learn more...](#)  
Step 2: investigate the issue and establish root cause(s). [Learn more...](#)  
Step 3: identify and document tasks to improve. [Learn more...](#)  
Step 4: monitor and update action plan. [Learn more...](#)  
Step 5: review success criteria and debrief. [Learn more...](#)

---

**1. Team**

Owner: Joseph Rice | Participants: 3

Name	Limited	Full	
Bryan Fernandez	<input type="radio"/>	<input checked="" type="radio"/>	x
Bryan Rhodes	<input type="radio"/>	<input checked="" type="radio"/>	x
Michelle Pfister	<input checked="" type="radio"/>	<input type="radio"/>	x

---

**2. Root Causes**

Describe identified cause(s)

We've experienced a rather high rate of turnover in the last three months which has resulted in:  
1) overburdened staff who are often just trying to keep up with the essentials  
2) a relatively high number of new people who either haven't received the proper training or mentoring due to #1.

---

**3. Proposed Solution**

## 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 top 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

Created date: Apr 22, 2016 5:50 PM

Target Completion Date

Completion date:

08/31/2016

Workflow Step

Approved

Plan Status

In Progress

### 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 that is complete. Thanks. -JD

Plan Updates

[Upload a File](#)

Enter notes and updates as needed as the plan progresses.

ADD NOTE

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

plan ready for approval

# Track individual Plans & Rolled Up Progress Reports

The screenshot displays the Maritz CX Manager Action Board interface. At the top, there are navigation tabs for 'Surveys & Data Collection', 'Analysis & Reporting', and 'Action & Alerting'. The user 'Bryan Rhodes' is logged in. The main dashboard is titled 'MANAGER ACTION BOARD' and includes a 'SHARE' button and a 'DATE RANGE' selector. It features two primary charts: 'PLANS BY FOCUS METRIC' (a pie chart) and 'PLANS BY STATUS' (a grouped bar chart). Below these is a section for 'PLANS AWAITING REVIEW' with a table of plans ready for review.

**Plan ID**    **Dealer**    **Created On**

168	61091	Apr 22, 2016
166	61091	Apr 22, 2016

**PLANS BY FOCUS METRIC**

Action Plans by Focus Metric  
Focus Metrics

Focus Metric	Count
Overall Service	8
Overall Sales Support	5
Overall Delivery Service	2

**PLANS BY STATUS**

Action Plans By Status  
Hierarchy > Region 1

District	New	In Progress	Closed
District 1	3	1	4
District 2	1	3	6

**PLANS AWAITING REVIEW**

Ready for Review

Plan Title	Status	Plan Owner
Action Plan 1	New	Cory Harker
April Quarter Action Plan	New	Bryan Rhodes
Birmingham branch training plan	New	Bryan Rhodes
Charlottesville plan	New	Bryan Rhodes

# View and Update Plans on the Go



# Remove Barriers, Empower Action & Drive Change



Stacey Nevel, Director  
Customer Experience Management



Confirmit.

# 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

# Confermit in Brief



## 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



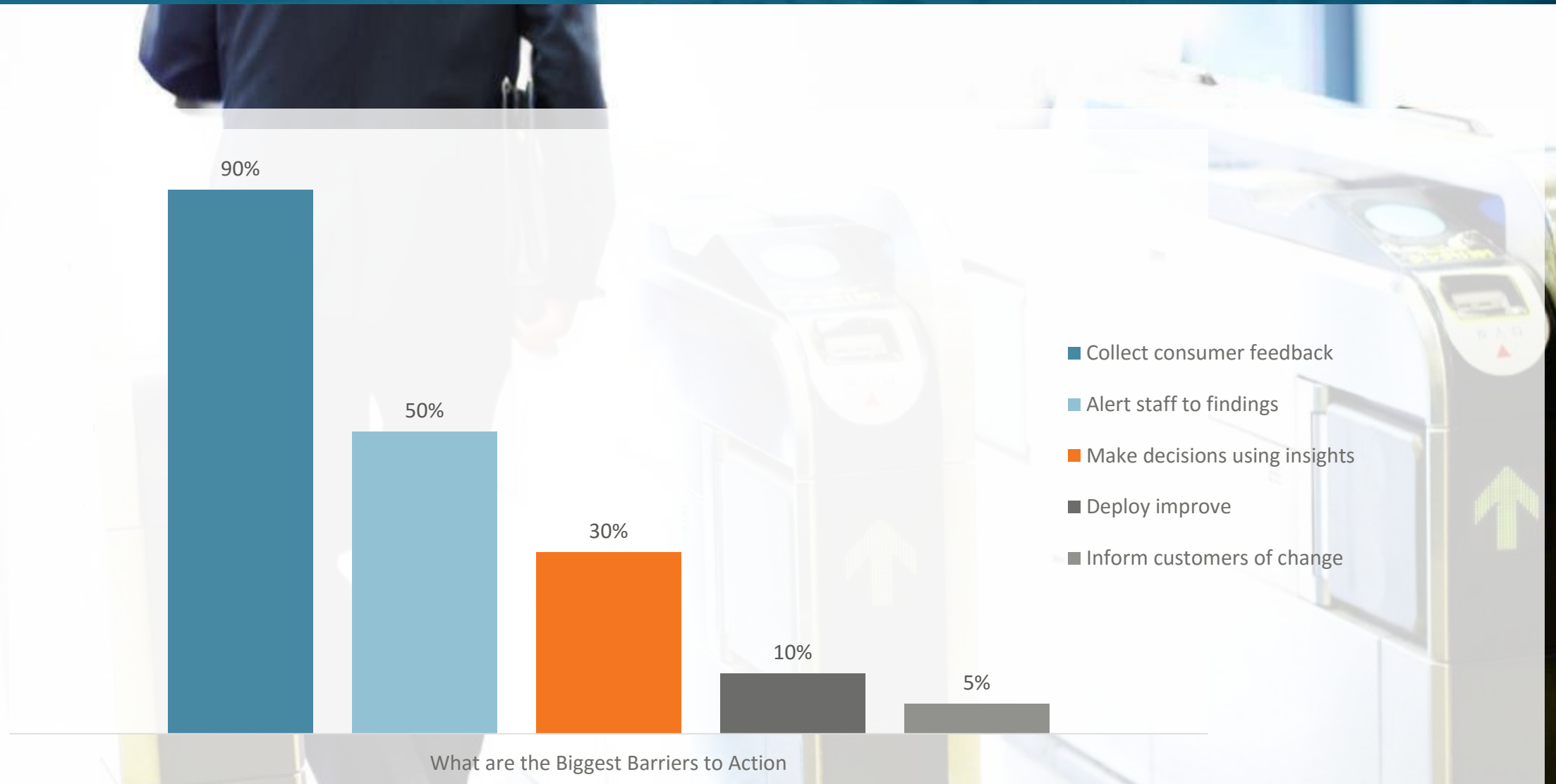
5. Show  
Value

---

**“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?



# What are the Biggest Barriers to Action?





# Barrier = Culture



# Culture: Just What Makes That Little Old Ant...



**Break down  
silos**



**Engage the  
business**

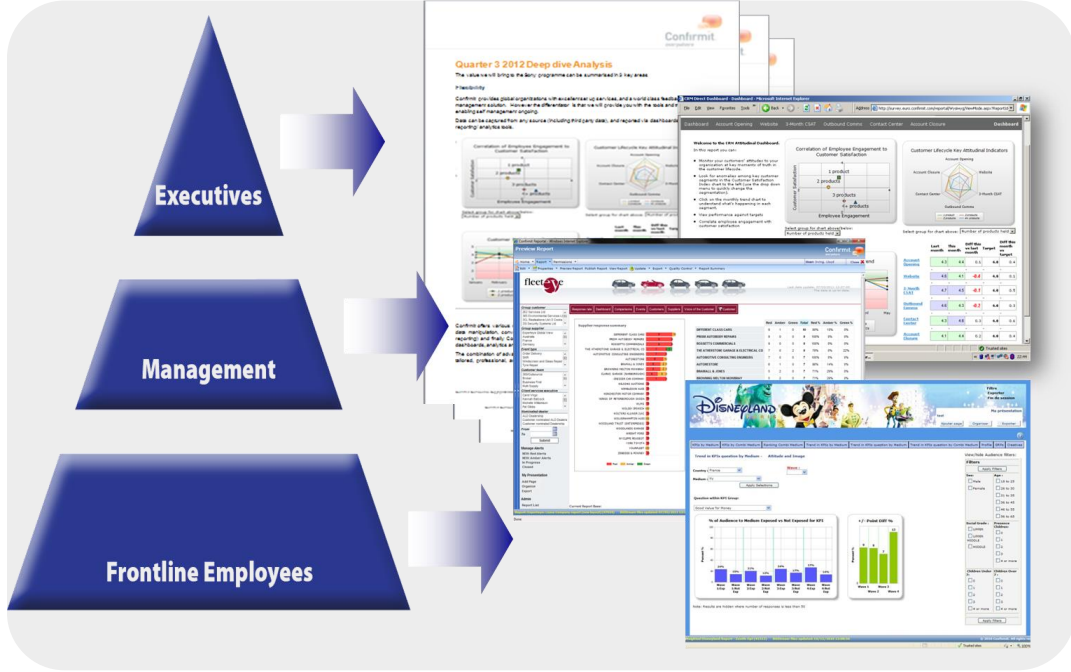


**Empower  
for action**

# Break Down Silos



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



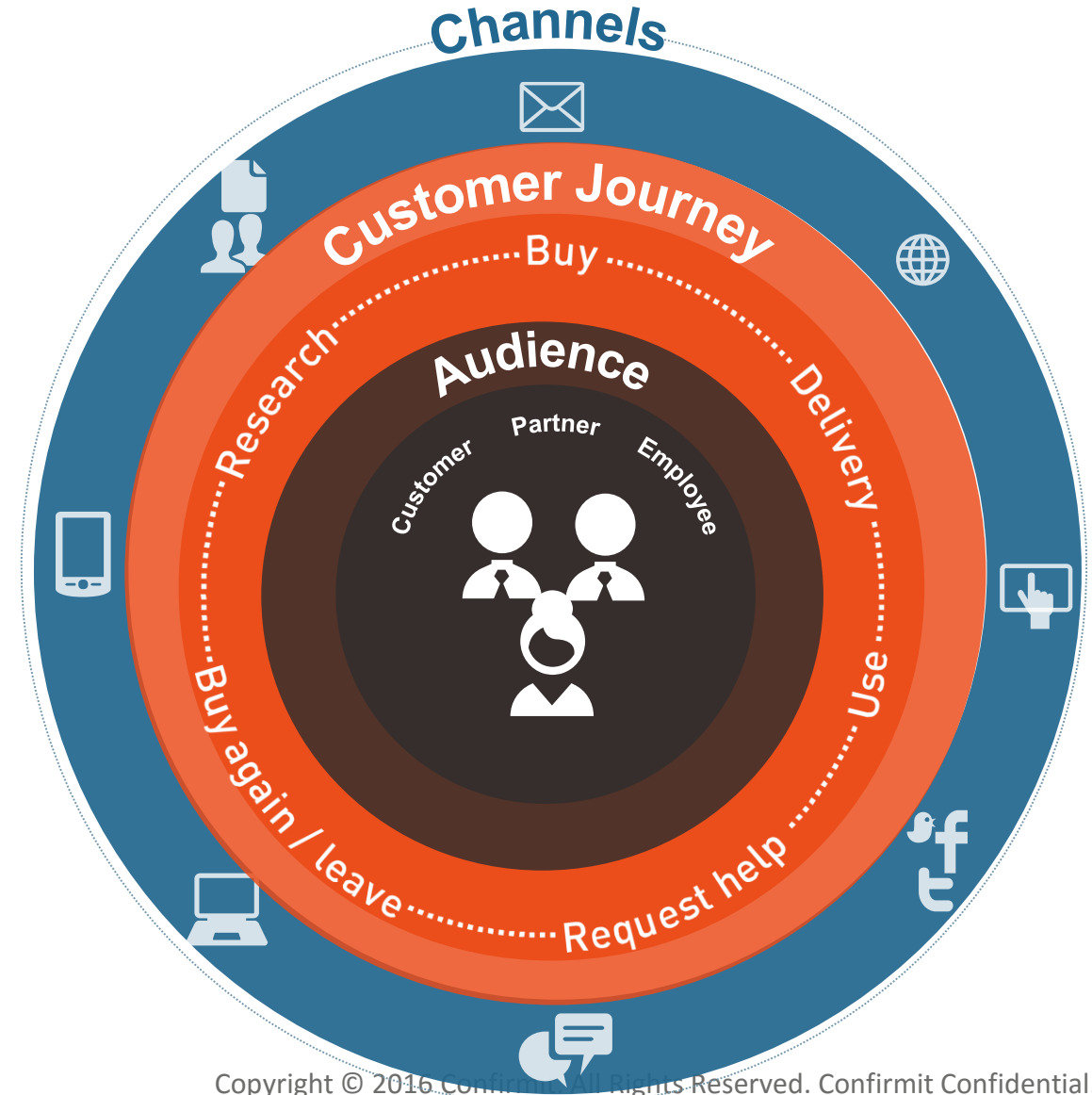


# Barrier = Listening

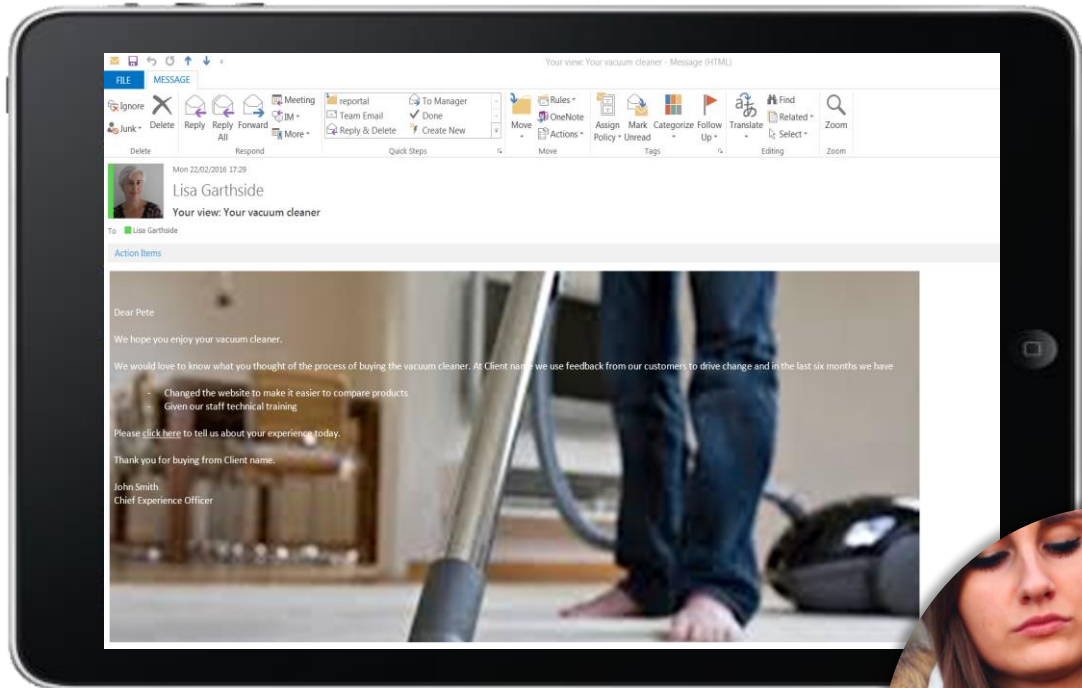


# How do we Encourage Feedback?

- **WHO** do we listen to?
- **WHEN** do we listen?
- **HOW** do we listen?



# How do we Engage With the Customer?



Web

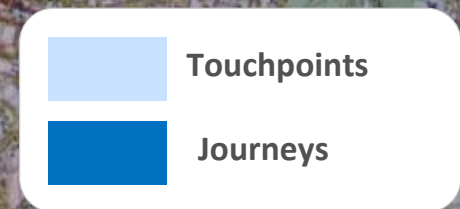
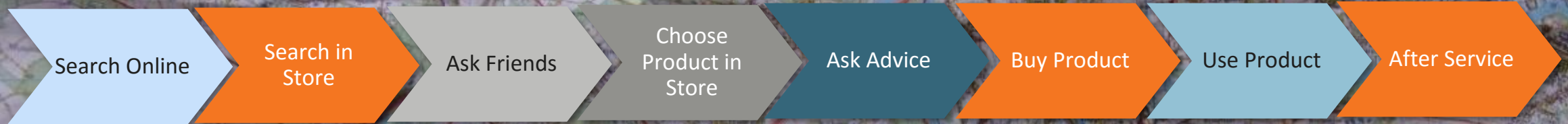
SMS

App





# 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

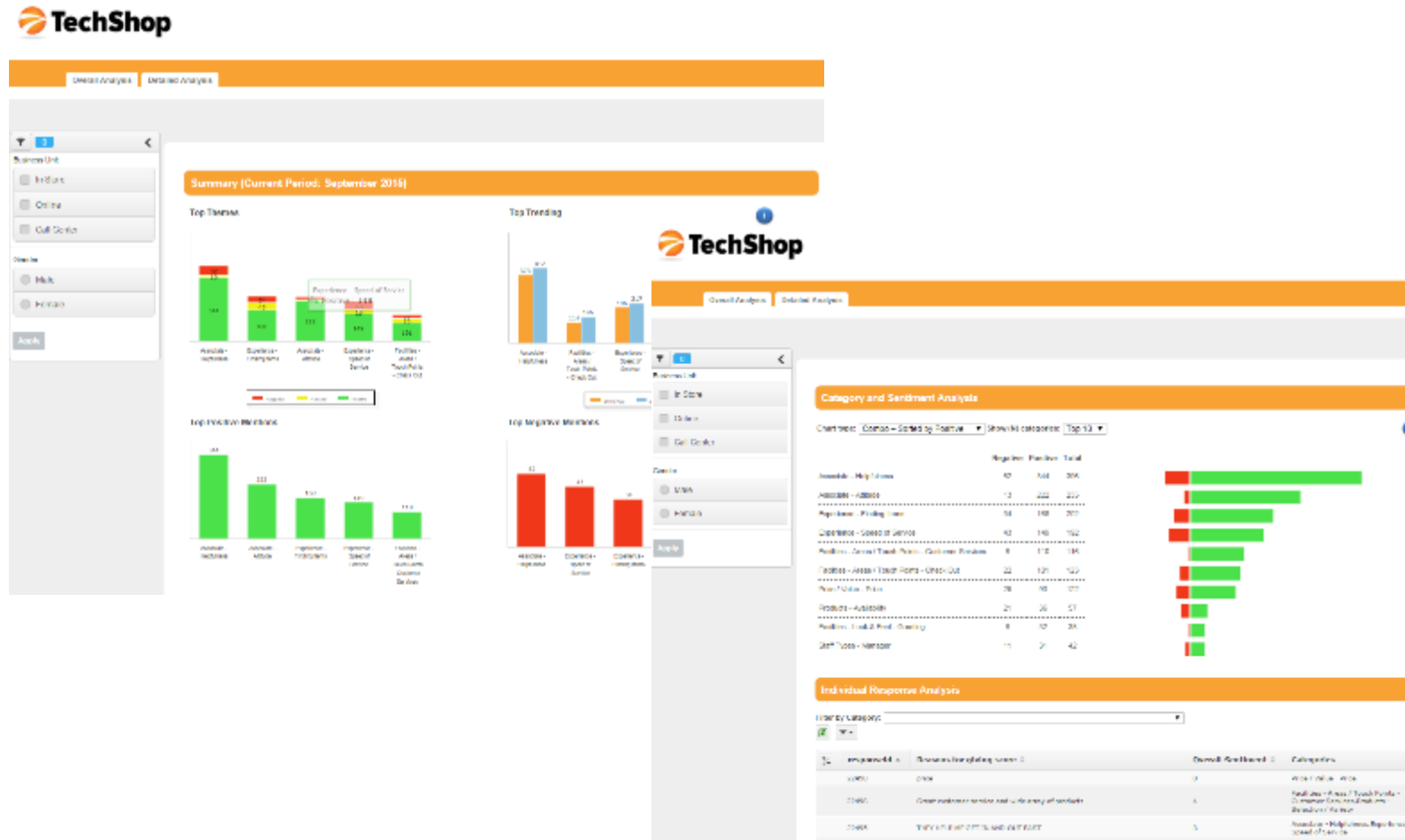
Social Networks



## Integration

Data Feeds

# Managing Unstructured Feedback



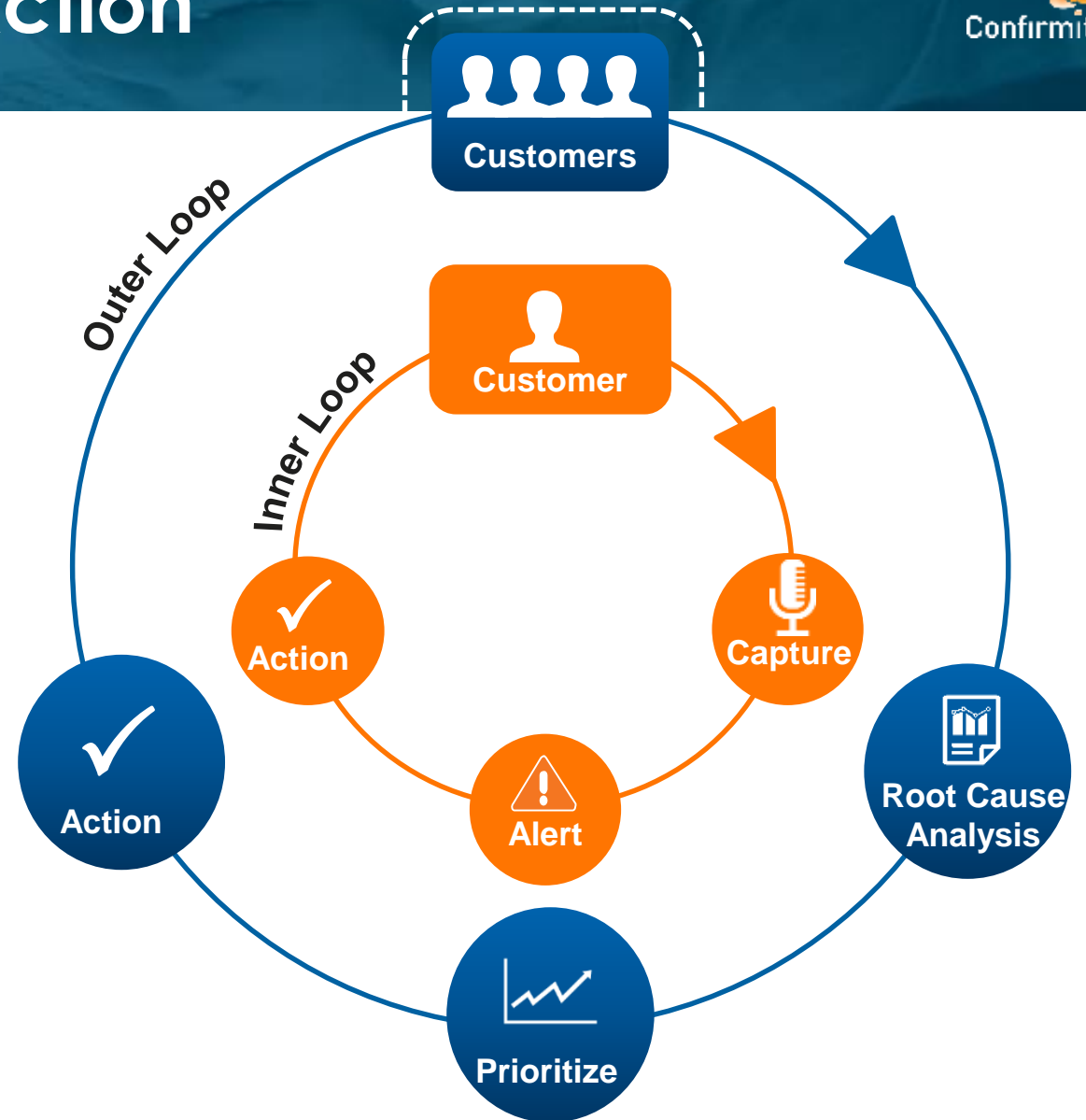
# Barrier = Data Overload



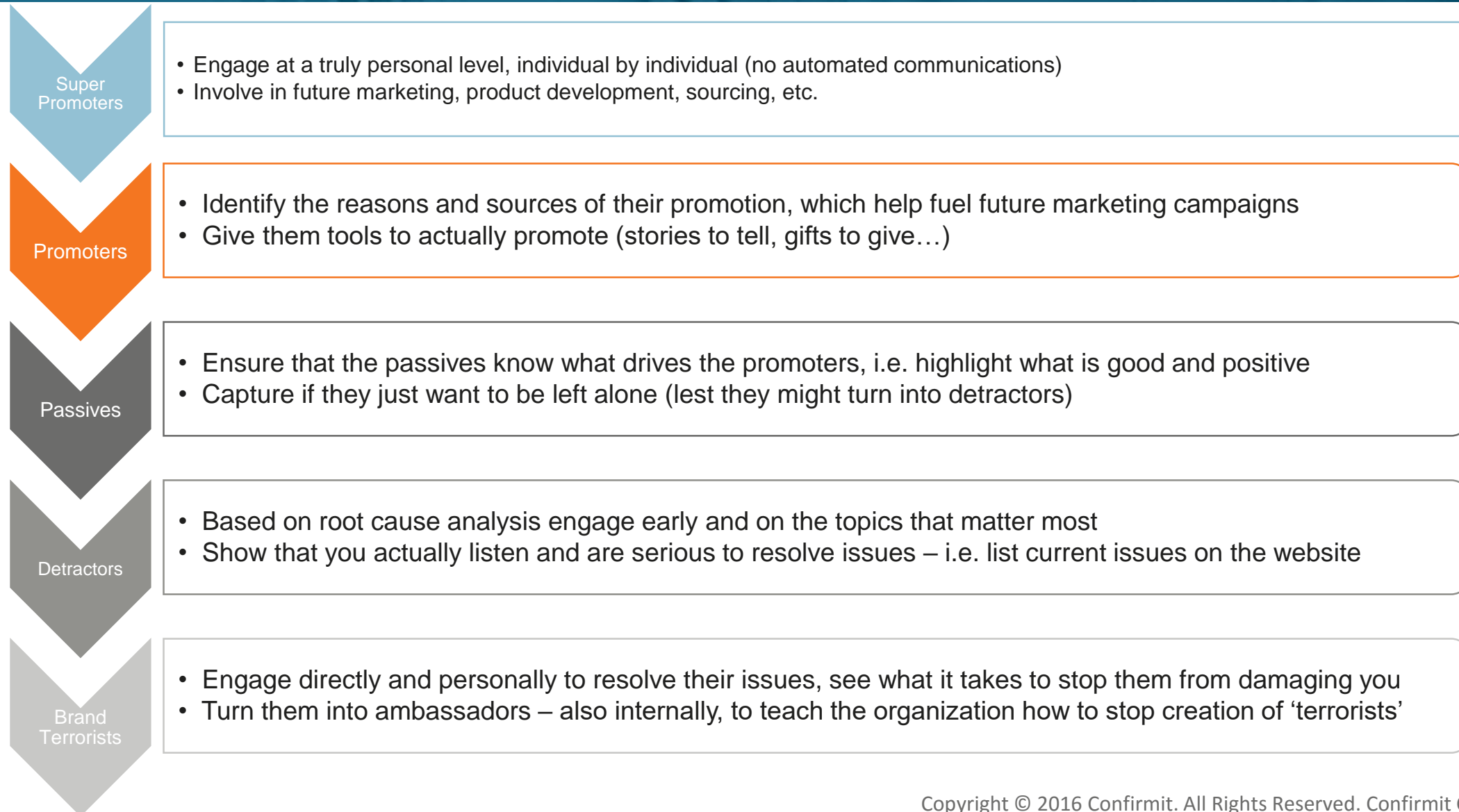
# Driving Action

## Act

- Closed Loop – Tactical
- Strategic Drivers



# Differentiate Conversations Based on Customer Attitude



# Understanding the Root Cause

## Key Drivers of Overall Satisfaction

Key Vulnerabilities	
1	Comfort 47
2	Heating/cooling in room 29
3	Cleanliness 19

Key Advantages	
1	Check-in 1
2	Hospitality 2
3	Quality of service 4
4	Value for price paid 4
5	Promptness of service 5

Potential Vulnerabilities	
1	Housekeeping services 14
2	Decor 12
3	Condition of rooms 11

Potential Advantages	
1	Menu Variety 14
2	Quality of beverage 12
3	Quality of food including ingredients, flavor, temperature, and presentation 11

# Monitoring the Action



Not enough 'just' to take action...

### Best Practices

q23 Rep technical knowledge

Search

Select	Name	Description
<input type="checkbox"/>	Employee training seminars • ac456	Run a single day onsite seminar for all employees at locations throughout the company. Be sure that seminars include information on job requirements, benefits, and on the job training plans.
<input checked="" type="checkbox"/>	Individual incentives • ac458	Individual incentives were provided dolor sit amet, sapien ligula ut felis sit ut mattis, eleifend sed pede ligula, fusce porttitor integer wisi lectus est justo.
<input type="checkbox"/>	Stipend for conferences • ac502	Determine an annual stipend for employees to attend conferences. Moneys can be applied to travel costs and attendance entrance fees.
<input type="checkbox"/>	Mentoring • ac607	The team went to the extra effort of dolor sit amet, sapien ligula ut felis sit ut mattis, eleifend sed pede ligula, fusce porttitor integer wisi lectus est justo.
<input type="checkbox"/>	Centers with onsite upper management • ac609	Upper management onsite made a dif sit amet, sapien ligula ut felis sit ut mattis, eleifend sed pede ligula, fusce porttitor integer wisi lectus est justo.

**Add selected actions** Cancel

### First Call Resolution

Settings Chart Add event

Month	Score
Jul 2014	8.8
Aug 2014	9.5
Sep 2014	6.5
Oct 2014	8.3
Nov 2014	7.2
Dec 2014	9.2
Jan 2015	8.3
Feb 2015	7.8
Mar 2015	8.3

Log • 1-3 of 10

Amy Rothchild

Post a comment Post Add a file

Amy Rothchild Just now

- Event added: Onsite training seminar 20 Feb 2015

### Actions

Add from Best Practices

Add an action Add

Sort by newest

- Courses on legacy software • AC 235 • Sheldon Smith  
Added 03 Mar 2015 • Due 01 Apr 2015  
Provide access to courses covering content and functionality of legacy software. Consider requiring new employees to view a minimum of 3 segments over the first month of employment.
- Knowledge transfer • AC 237 • MaryAnne Withers  
Completed 02 Jan 2015  
When agents leave the call center, conduct exit interviews to collect information on which techniques worked best for them. This information should be stored and made available to other agents.
- Employee tips & tricks • Freud Erikson • Completed 02 Dec 2014  
Refer all agents to the best practice database located on the shared server. It contains tips and tricks from current and past agents and has a scoring component that ranks techniques based on effectiveness.



# 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



---

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

**- Abraham Lincoln**

# Thank You! Q & A

Maritz **CX**



**Matt Inman**  
Senior Director, CX Strategy  
& Design Consulting  
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**Stacey Nevel**  
Director, Customer Experience  
Management  
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stacey.nevel@confirmit.com

  
Confirmit.

# Confirmit in Brief



- **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.

# Requests for Information

Bill Bradley  
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Tel. 978-715-2587



**ΩMEGA**  
Management Group Corp.

**Check for upcoming webcasts at**  
[www.omegascoreboard.com/webcast.php](http://www.omegascoreboard.com/webcast.php)