Case Studies: Award-Winning CEMDNA Playbook Strategies

May 14, 2015
2:00 pm-3:00 pm EDT
Featured Speakers

Fred Bonaventura
Director, Global SPARC Technology Service Center

Dennis Fitzgerald
VP Customer Satisfaction

Anthony Daubenmerkl
VP Global Client Support
The Road to Customer Loyalty
How Oracle Systems Support Improved Customer Satisfaction

Fred Bonaventura
Director, Global SPARC Technology
About Oracle

Unleashing Innovation by Simplifying IT

Oracle offers an optimized and fully integrated stack of business hardware and software systems. Oracle engineers hardware and software to work together in the cloud and in the data center – from servers and storage, to database and middleware, through applications.
The **Satisfaction Ecosystem**

**Business Performance**
- Profit and Growth
- Customer Loyalty

**External Performance**
- Customer Satisfaction

**Internal Performance**
- Employee Satisfaction
- Employee Loyalty
- Employee Productivity

**Connected Through Value**
- Service Value
- Customer Value
- Customer Satisfaction

**Value**
How We **Measure Success**

- Panels
- Targeted Surveys
- Global Relationship Surveys
- Transactional Surveys

**Consolidated Customer Experience View**
Global Systems Support Approach

**KEY ELEMENT**

- Transform how we interact with our customers in every situation to provide a world-class service experience.
- View “Customer Satisfaction” as the first step toward Loyalty and Delight.
- Improve collaboration across Oracle teams and break down any barriers to great customer service.
- Drive towards outcomes that demonstrate our service commitment.

**KEY BENEFIT**

- Focus on each customer’s business needs, not just on the product(s) involved in the SR.
- Build upon continuous improvements that reflect engagement and commitment from our customers.
- Drive efficiency and effectiveness through teamwork, partnership, and a shared vision of our future state.
- Become a key differentiator in purchase and renewal decisions, driving long-term business relationships.
Outcomes Through Execution

Overall Systems Support Satisfaction
Safe Harbor Statement

The preceding is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle’s products remains at the sole discretion of Oracle.
Award-Winning
CEMDNA Playbook Strategies

Dennis Fitzgerald
VP, Customer Satisfaction
Yaskawa Electric Corporation
Kitakyushu, Fukuoka, Japan
- Founded: 1915
- Sales: $3.3 Billion
- Associates: 13000

Yaskawa America, Inc.
Drives & Motion Division
Waukegan, IL, U.S.A
- Founded: 1967
- Sales: $635 Million
- Associates: 1500

Robotics

Drives

Motion Control
Yaskawa America Business Landscape

Yaskawa America Inc.
Yaskawa Electric Corp.

Yaskawa America Channel Customers
- 200 Distributors
- 100 OEMs

North American End User Community

Original Equipment Manufacturer (OEM)

Distributor
AC Drives (50%)

Distributor
Servo & Controllers (30%)

Distributor
After Market Service (70%)

Dealer

Yaskawa Japan Customers

Yaskawa Germany Customers

Yaskawa Asia Customers
Identify Key Touch Points with Customer

**Identify**
- Profile Individual Customers
- Create Demand
- Define Market Segments

**Service**
- Track Customer Service & Satisfaction
- Provide Field Service Technical Support
- Provide Call Center Technical Support

**Target & Win**
- Manage Lead Pipeline
- Support Pre-Sale Activities

**Sell**
- Sell & Place Order
- Track Order Status
- Manage Transaction
- Fulfill Order

**Customer Relationship Cycle**
- ID Need
- Plan Purchase
- Select Product
- Make Purchase
- Make Payment
- Accept Delivery
- Use Product
- Service & Maintenance
- Touch Points with Customer
- Touch Points with Customer

**YASKAWA**
# Mapping out KPIs

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Source</th>
<th>Goal</th>
<th>Customer Experience</th>
<th>Employee Productivity</th>
<th>Operations Management</th>
<th>Financial Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Call Close</td>
<td>Interactions handled and resolved with first contact - not including calls that are transferred</td>
<td>Case Management</td>
<td>80%</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Repeat Report</td>
<td>Interactions that are reopened within 24 hours of being closed</td>
<td>Case Management</td>
<td>5%</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Average Case Resolution Time</td>
<td>Average total number of business hours from the moment the interaction is received to resolution</td>
<td>Case Management</td>
<td>determine by case type</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Abandonment Rate</td>
<td>Percentage of callers who hang up before the call is answered</td>
<td>ACD</td>
<td>&lt;4%</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Wait Time</td>
<td>Number of seconds to answer call.</td>
<td>CTI - by contact point</td>
<td>phone &lt;25 Sec</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>email/fax &lt;4hrs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Issues and Complaints</td>
<td>Root cause analysis to develop preventive measures</td>
<td>Case Management</td>
<td>&lt;0.05% of case load</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>Surveys customers regarding satisfaction with Yaskawa's products and services</td>
<td>Annual Customer Satisfaction Survey</td>
<td>Year over year improvement</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2005 Yaskawa Embarked on our CRM Journey
Annual, Transactional and Phone Surveys

Yaskawa Customer Satisfaction

![Graph showing Yaskawa Customer Satisfaction over years from 1999 to 2014. The satisfaction score ranges from 70 to 88, with a general trend of improvement.]
Roadmap
CEM is the identification and measurement of all the interactions a company has with its customers to ensure each company activity delivers value so customers continue to buy and recommend the company’s products and services.
Are we on the right Path?

Just like a pilot needs a navigation system, we need a blueprint, a CEM Playbook Strategy™ that will keep us on course, allow us to make mid-course corrections and achieve our vision of Customer Experience Management.
Validate our CEM Program

CEM - DNA Playbook Strategy℠
Validate our CEM Program

CEM - DNA Playbook Strategy
Analyze

5 Analytics

- Gap Analysis
- Vulnerability Index
- Key driver analysis
- Text Mining
- Predictive
- Omega ScoreBoard Index
- Balance ScoreCard
- Net Promoter Score (NPS)
- Key Performance Indicators (KPI)
- Others
Analyze

Benchmarking

- Top 25 – Best in Class
- NorthFace ScoreBoard Recipients
- Industry
- Head-to-Head Competitors
- Multi-National Benchmark by Country
Employee Recognition & Compensation

- Set balance goals on KPI’s and customer satisfaction
- Recognize/reward employees individually and/or by group
- Link compensation to customer satisfaction results

Employee Training

- Continuous employee training – soft skills & technical competence
- Customer Relationship Management Certification Training
- Customer Experience Management Certification Training
Constantly Monitor

Yaskawa Customer Satisfaction

Productivity Gains

% of 2000 Revenue and GP


We Are Here

1 2 3 4

YASKAWA
Summary

- Analyze your CEM Strategy.
- Focus on areas of improvement which could yield the best ROI.
- Continually monitor your CEM Metrics.
- Continually monitor the CEM space for emerging trends.
- Engage in third parties to assist in your journey.
Move, Manage and Secure Collaboration Content

Tony Daubenmerkl
VP Global Client Support
Move, Manage, and Secure Content for SharePoint, Exchange, On-Premises, Office 365, Private & Hybrid Cloud

Founded: 2008  
Headquarters: Switzerland & Wash DC  
Employees: 325+  
Teams: Global  
Growth: 55% CAGR

Move
- Plan
- Migrate
- Consolidate
- Monitor

Secure
- Replicate/Failover
- Archive
- Backup & Restore
- Permissions
- Content security

Industry Recognized Management Solutions for
- SharePoint
- Exchange

Manage
- Organize & Manage
- Storage Optimization
- GEO - Synchronization

*MSOCAF - Microsoft SharePoint Online Code Analysis Framework – required for deploying custom solutions on Office 365
August 2013 News

Metalogix has acquired Axceler and Idera’s SharePoint businesses including market leading SharePoint administration and permissions management, backup and diagnostic monitoring technologies.

With the addition of these best of breed offerings Metalogix now offers the industry’s most complete infrastructure management suite of products to deploy, operate and protect SharePoint. Metalogix offers the industry’s only live person 24X7 technical support. For the first time, organizations have a single provider to leverage for all of their SharePoint infrastructure needs.
The Discovery

- **Doubled Customers**
  - From 7,000 licensed customers to 14,000 plus

- **Client Success**
  - Single contact “House on Fire” Approach
  - No focus on future sale or renewals
  - Customer Experience not positive

- **Support Team**
  - Heavy workload
  - Customer resolution challenges
  - Limited data in CRM system to address issues
  - Dedicated
  - Frustrated
  - Felt under staffed

= Pending Failure
• **Measured:** Understood their primary frustration – Customer & Staff
• **Analyzed:** Cases, licenses, customers, challenge areas
• **Acted:** Customer & Team focus – internal and external, communication
• **Assess:** ROI - Maintenance renewals, product sales, customer satisfaction
Metalogix Client Success Lifecycle

**RAPID DEPLOYMENT**
- Licenses
- Software Download
- Portal Access
- Best Practices Guides
- Support Welcome Package

**TRAINING**
- Metalogix Academy
- Support Quick Takes
- Support Round Table
- Ongoing team member investment

**LIVE 24 X 7 SUPPORT**
- Phone, Portal, Skype, Chat
- MSFT Certified Specialists

**HEALTH CHECK**
- 30-60-90 day health check
- Upsell Stimulation
- 1-1 Call with Metalogix Specialist

**CONTINUOUS MARKETING**
- Verify ROI
- Net Promoter Score (NPS)
- Success Story
- Product Education

**RECOGNITION**
- Awards
- Speaking opportunities with SharePoint community & customers

**RENEW**
- Account Management Team
- Automated Tricks & Tips
- Bundle Offers
- Annual Health Check

**Ease of Use**

**Customer Satisfaction & Commitment**
Outcome

1. **Improved Customer Satisfaction**
   - Product support surveys

2. **Increased Maintenance Renewals**
   - First quarter return
   - Approximately 200 additional renewals

3. **Increased Re-Occurring Sales**
   - First quarter return
   - Increased the number of products per customer by 5%

**Embedding ‘Client Success’ into the process has:**

1. Solidified the ‘TEAM’ commitment to our organization and our customers
2. Improved customer satisfaction continues to increase maintenance renewals
3. Increased products installed
Support Workload Redefined

- Positive customer feedback – Win back and ROI
- Acquiring the NorthFace Award

Cases: 2013 2014 2015
Summary

Ensure Customer Commitment from Day 1:

1. **MEASURE and ANALYZE**
   - You Don’t Know What You Don’t Know

2. **ACT: TEAM**
   - Involvement from Day one
   - Listen, Plan and Act

3. **ACT: Customer**
   - Outreach
   - Recovery

4. **ASSESS: ROI**
   - Future Sales
   - Renewals
Thanks for Your Participation

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