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CUSTOMER ACCOUNT REVUE™ PROCESS

Obtaining accurate customer feedback is a priceless resource in business today and one not to be taken lightly. Too often, companies take anecdotal information from filtered comments from field reps or occasional customer contacts -- allowing the "squeaky wheel" to frame business choices.

At ADR, we design a unique customer feedback process based on *your* business environment in order to provide you with truly useful ("actionable") information.

The Customer Account Revue™ process is more than a simple measurement of customer satisfaction. Instead, it assesses the customer relationship from a 360-degree perspective.

- Who in your organization do your customers interact with? (TouchPoint analysis)
- What are their expectations and evaluations of each type of interaction?
- How does your fulfillment of these expectations impact satisfaction, and importantly, loyal customer behavior? (key drivers of satisfaction / loyalty)
- How best can you prioritize your efforts for greatest effect? (Performance/Importance Mapping)

The Customer Account Revue™ is suited for those companies focused on monitoring satisfaction so that adjustments can be rapidly implemented to maintain happy customers. Ongoing Customer Account Revue™ tracking can positively impact internal processes designed to build business revenue by keeping a happy and loyal customer base.

Customer Feedback Monitor™

One approach we have used with especially good results in the B-2-B business environment is a 2-Part Customer Feedback Monitor™.

- Relationship Monitor™ interviews conducted at Account Management level, and
- TouchPoint™ interviews conducted at the day-to-day field contact level

The overall objective of the Customer Feedback Monitor is to assist in identifying and responding to key drivers of customer loyalty that will help build more profitable and sustainable business relationships. Each component of the Monitor brings a vital piece of the "big picture" into focus.

- **Customer satisfaction tracking, for all its inherent value in tracking internal service metrics, is often the source of internally-focused interest in *past* performance.**
  - At ADR, our focus in customer satisfaction measurement is less on past performance and more on forward positioning in the marketplace.
  - We find for example, that customer satisfaction tracking in the business-to-business model provides an excellent vehicle for tracking trends in the marketplace and how your customers see you within the future paradigm.
- **Customer satisfaction measures are all too often taken in a void.**
  - We know from analysis within a variety of industries that customer satisfaction rarely has a direct correlation to the ultimate test of your relationship with customers: customer loyalty (return business or consideration).
- **Customer loyalty (and its antithesis, customer migration), should be a focus of organizational attention because of the minimal cost associated with keeping and "growing" a customer versus developing a new one.**
- **In its simplest forms, a customer loyalty focus helps identify causes of dissatisfaction that can potentially be fixed before losing customers.**
  - Another important bi-product of this focus is the ability to prioritize the management of meaningful service metrics to become more competitive.
  - Lastly, a further tactical step can be taken to "red flag" potential migrators in your customer data base. Specific marketing efforts can then be targeted to these customers - before they leave.

Relationship Monitor™

The overall objective of quarterly Relationship Interviews is to develop the capability for obtaining on-going, high-level decision maker feedback from your customers. This enables tracking of business metrics of importance to your success and also provides insight into issues requiring further investigation.

Other objectives might also include the following:

- Tracking key "Scorecard" measurements against results measured in the past
- Tracking key variables used by stakeholders throughout the organization as business process metrics
- Providing the organization with a customer-driven "Problem Reporting" capability, which provides a more rapid and agile response to addressing customer issues
- Providing the capability of identifying "At Risk" customer relationships
- Providing an "Ad-Hoc" capability to use this on-going interview to ask topical questions that do not otherwise warrant a full research effort

Because these interviews are done at a higher organizational level, we generally recommend conducting them once a year. Executive level interviewers trained to listen (not merely to read a script) are used so that interviews are conducted in a conversational manner and responses are clarified as needed.

TouchPoint Monitor™

The overall objective of the TouchPoint Monitor™ is to focus on the end-user customer who comes in day-to-day contact with you. Where Relationship Interviews are focused more on high-level customer concerns, these transaction-level interviews allow us to dig deeper into the specific customer needs and expectations that surround specific products and services you provide to your customers. Often considered your "Frontline" defense, this part of the Customer Feedback Monitor™ provides forewarning of problems that might otherwise escalate to the Relationship level.

Specific objectives might include, but not be limited to, the following:

- Measuring customer reactions to their experience with specific products and services across key driver variables
- Tracking customer perceptions of your performance on key operational metrics
- NOTE: While the length of the interview is certainly a critical factor, we believe that the usefulness of this Monitor component is also enhanced by building in the flexibility to add "ad-hoc" questions when necessary

Most clients find it useful to monitor TouchPoints on a regular basis throughout the year as an "early warning" system.

Deliverables

Action reports from the Customer Account Revue™ Process typically take as many as four forms:

1. Executive reports rolling the 360-degree view (TouchPoint and Relationship interviews) together for operational use
2. Report cards monitoring key operational metrics on an on-going basis
3. Sortable verbatim comments for in-depth staff analysis
4. Problem reports generated while interviewing is taking place and a customer interview indicates a need for immediate attention and action

WHY GO THROUGH THIS PROCESS?

Monitoring key driver attributes that are specifically linked to bottom line improvement in *obtaining* customers (opening the front door) as well as in *maintaining* customers (closing the back door) becomes a first line of defense against defections, and of course, supports efforts to maintain and grow market share.

This approach not only helps uncover operational strengths and weaknesses, it gives management tremendous insight into customer expectations and strategic concerns, and assure customers that your company is unique in its interest in listening to them.

ADR Associates, Inc

…Helping Connect With Customers

ADR Associates is a corporation founded in 1994 specializing in strategic positioning, market research and communication counsel. Based at Red Hawk Ranch, a unique executive off-site location, ADR brings the customer voice into management's focus. Helping clients understand customer perceptions is often the foundation of ADR's involvement and becomes a driving force for creating and fine-tuning successful business strategies.

Red Hawk Ranch is headquartered in California's Temecula Valley Wine Region. Visit us at www.redhawkranch.tv.