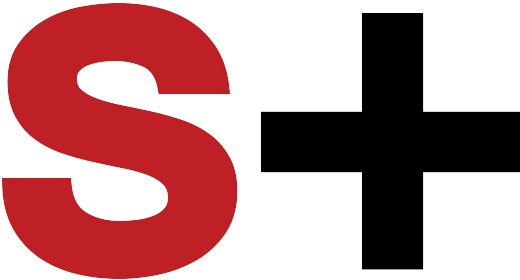




The Customer Experience Maturity REPORT & RECOMMENDATIONS

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This is an automatically generated report that has been generated using SandSIV CEM self-assessment tool. This report contains a list of recommendations that you may like to consider, to enable your organization to move closer to CEM maturity. For further reading, you may find our free CX Maturity Model White paper a useful resource.

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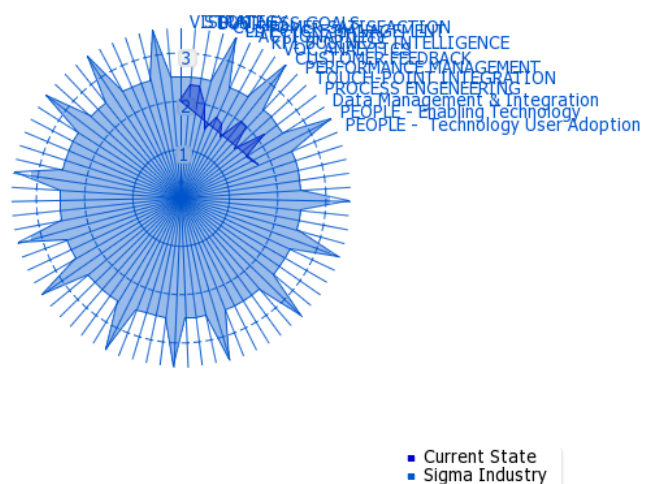
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You are provided below with a detailed list of your current CEM position, alongside industry norms for the location you indicated.

| CEM Success Drivers | Current State | Sigma Industry |
|---|---------------|----------------|
| VISION - Senior Management Commitment | 2 | 2.5 |
| STRATEGY - Customer-Centric Organization | 2.3 | 2.5 |
| BUSINESS GOALS - Objectives Alignment | 2.3 | 2.5 |
| CUSTOMER SATISFACTION MANAGEMENT | 2 | 2.5 |
| LIFECYCLE MANAGEMENT - Customer Strategy | 1.5 | 3.5 |
| ACTIONABILITY - Insights Knowledge Creation | 1.8 | 2.5 |
| KPI BUSINESS INTELLIGENCE | 1.8 | 2.5 |
| VOC ANALYTICS | 1.5 | 2.5 |
| CUSTOMER FEEDBACK MANAGEMENT | 2 | 3.5 |
| PERFORMANCE MANAGEMENT | 2 | 2.5 |
| TOUCH-POINT INTEGRATION | 1.5 | 2.5 |
| PROCESS ENGINEERING | 2.2 | 2.5 |
| TECHNOLOGY - Data Management & Integration | 1.6 | 2.5 |
| PEOPLE - Enabling Technology | 1.7 | 3.5 |
| PEOPLE - Technology User Adoption | 1.8 | 2.5 |
| CEM Maturity Score (out of 100) | 39 | |

The visual indicator below shows your current CEM maturity, and compares this to industry/regional norms.



VISION - Senior Management Commitment

| Maturity | CEM Success Drivers | Recommendations |
|----------|--|---|
| 60% | Senior management understand CEM is a complex, long-term initiative | Communicate with senior leaders that CEM is a business philosophy not a software implementation project. |
| 40% | Senior management has committed to provide resources to ensure success | To gain support, use our CEM due diligence tool to help senior management understand the value of CEM |
| 40% | CEM systems are stable, reliable, and have been incorporated into DR plans | If you are planning to implement an on-premise solution, consult your CIO to determine IT requirements. |
| 20% | Senior management have set clear project milestones and delivery dates | Use the CustVox due diligence tool to set clearly defined goals, objectives, timelines, and success measures. |
| 40% | Senior management is dedicated to improving customer experience | Interview your senior stakeholders to confirm that customer experience is currently a top priority. |

STRATEGY - Customer-Centric Organization

| Maturity | CEM Success Drivers | Recommendations |
|----------|--|--|
| 60% | Customers are strongly focused on by all enterprise departments | Promote customer-centricity by explaining to each department how their function drives value for customers. |
| 40% | Customer needs drive business planning & decision-making | Ensure VP Customer Experience has a seat at the board room table and adequately represents customer needs & interests. Alternatively make sure is in the CMO agenda. |
| 60% | Customer Profiles have been distributed to sales & service staff | Communicate with CRM or BI teams to identify whether customer segmentation strategy is in the roadmap. |
| 20% | Customers do not have to repeat information to multiple staff | Ensure that your CEM program mandates documentation of customer issues to avoid frustrating customers. |
| 20% | Service level agreements have been established with escalation protocols | Escalate the need for a service level agreement to senior management. Ensure support and issue escalation protocols/timeframes are considered in this SLA. |
| 80% | We have solid loyalty/retention programs to increase retention rates | |

BUSINESS GOALS - Objectives Alignment

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|--|
| 60% | There is a general trend in your industry to add or improve CEM systems | Conduct competitive research & read analyst reports to determine if CEM is prevalent in your industry. |
| 40% | CEM is an initiative that has been slated in your enterprise strategic plan | Consult your strategic plan to determine if your organizational objectives are related to CEM programs. |
| 40% | Achieving success with CEM will help to achieve future enterprise goals | Brainstorm future use cases for CEM programs that can help you achieve long-term objectives. |
| 40% | Senior management agrees that CEM is critical for meeting future goals | Speak with senior leaders to determine which future initiatives they have stated require CEM functionality. |
| 40% | Depts have documented clear goals & deliverables for a CEM system | Interview department heads to identify and document clear goals and expectations from your CEM program. |
| 60% | Senior management understand CEM and how it can benefit the business | Provide whitepapers and case studies to senior executives to ensure they understand the impact of CEM. Feel free to download them at http://www.custvox.com |

CUSTOMER SATISFACTION MANAGEMENT

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|--|
| 40% | We conduct a customer satisfaction survey at least one per year | Use our Voice of the Customer Analysis tool to gauge customer loyalty and identify areas for improvement. |
| 20% | We understand the Net Promoter Score & 'The Ultimate Question' | Research the "Net Promoter Score" concept and determine how many of your clients would refer a friend. |
| 40% | We follow up on results of customer surveys and implement feedback | Write a follow up report that highlights action items taken based on customer satisfaction survey results. |
| 60% | We have a tiered support system & effectively resolve customer issues | Set up a tiered customer support process and measure the number/type of tickets that are escalated. |

LIFECYCLE MANAGEMENT - Customer Strategy

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|--|
| 20% | Every company has a clearly articulated strategy | Review company business plans to determine if a customer lifecycle management strategy exists |
| 40% | Not all customers are created equal and should be treated differently | Analyze the customer base to identify which customers generate the most revenue and profit |
| 40% | Customers are identified & targeted based on key common characteristics | Assess the performance of customer marketing campaigns based on current targeting criteria |
| 20% | Relationship investment decisions are based on the CLV | Review and assess the current customer information on which decisions are based on richness of offer |



ACTIONABILITY - Insights Knowledge Creation

| Maturity | CEM Success Drivers | Recommendations |
|----------|--|--|
| 40% | Transforming data into insights & knowledge is acknowledged & recognized | Interview senior leaders to understand their needs where insight-based decision making is concerned |
| 40% | Insights-based knowledge is applied regularly to drive strategy | Interview senior leaders to understand their needs where insight-based decision making is concerned |
| 40% | Insight-driven action plans are tracked, monitored and evaluated | Develop and implement a formal process to track, monitor and evaluate the impact of insight-driven action plans |
| 40% | We have the internal skill-based competency & expertise | Insight skills are rare; identify capable internal staff with the opportunity to develop them or externally recruit. |
| 20% | Customer knowledge is shared with key departments and functions | Develop a communication process that closes the gap & creates a learning environment across the org. |



KPI BUSINESS INTELLIGENCE

| Maturity | CEM Success Drivers | Recommendations |
|----------|--|--|
| 40% | Our business intelligence strategy that is continually maturing and evolving | Interview senior management to determine if business intelligence is a priority in the organization |
| 60% | Our BI framework provides real time access to reliable & consistent info | Assess the current "speed to business" relative to easy access to meaningful and reliable information across the organization. |
| 20% | Our BI strategy is supported by an integrated architectural framework | Review BI best practices relative to the current state within the company |
| 20% | Data quality & integrity is the foundation of our BI strategy | Interview senior management about their need for accurate and reliable information, delivered in a timely manner. |

VOC ANALYTICS

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|--|
| 20% | Analytics is viewed as a competitive differentiator in our industry | Read "Competing on Analytics" by Thomas H. Davenport |
| 40% | Analytics enables better understanding of the past behaviors of customers | Research articles and white papers on "customer segmentation" |
| 20% | We deploy analytics to allow us to anticipate customers future behaviors | Address the benefits of having the ability to predict or anticipate future customer behavior |
| 40% | Analytics supports targeting customers, at the right time, offer, & channel | Review the fundamental tenets of CEM and direct marketing |

CUSTOMER FEEDBACK MANAGEMENT

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|--|
| 40% | A robust campaign management methodology & process is implemented | Assess current campaign management processes & capabilities for activities, tasks, hand-offs and level of effort |
| 40% | Marketing automation technology is used to efficiently | Consider MA technology if current campaign workflow and processes are time consuming and manually intensive |
| 40% | Campaigns are tested across a variety of dimensions | Consider adopting a test and learn methodology in order to maximize response and optimize marketing spend |
| 40% | Results of all campaigns are tracked, measured and reported | Adopt a "what gets measured, gets managed" mentality. |
| 40% | Key learning's from campaign post analysis are reviewed | Adopt a "what gets measured, gets managed" mentality. |



PERFORMANCE MANAGEMENT

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|---|
| 40% | PM was originally introduced is continually championed by Sr. Mgmt. | Interview senior management to determine if performance measurement is a priority in the organization |
| 40% | PM succeeds when strategic & business performance measures are aligned | Review company's current strategic plan to determine if performance measures are aligned with corporate goals |
| 40% | Multi-directional, cross-functional communication is critical for Successful PM | Develop a communication process that closes the gap and creates a learning environment across the company |
| 40% | Disciplined & rigorous PM methodology is implemented, measured, tracked | Adopt a "what gets measured, gets managed" mentality. |



TOUCH - POINT INTEGRATION

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|--|
| 40% | Touch points are important because of customers perceptions | Review customer experience/satisfaction studies to understand the impact of touch point interaction across the organization. |
| 40% | We consistently fulfill our brand value proposition across all touch-points | Review customer experience/satisfaction studies to understand the impact of touch point interaction across the organization. |
| 20% | All "push" & "pull" customer touch points are mapped across the enterprise | Perform an audit of all customer touch-points and map them across the enterprise |
| 20% | The customer experience is mapped across all touch points | Perform an audit of all customer touch-points and map them across the customer lifecycle |

PROCESS ENGINEERING

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|---|
| 40% | Processes are documented for Sales | Define your sales process and identify where the CRM system will automate workflows. |
| 40% | Processes are documented for Marketing | Define your marketing processes and identify where the CRM system will automate workflows. |
| 60% | Processes are documented for Customer Service | Define your customer service processes and identify where the CRM system will automate workflows. |
| 40% | Processes are documented for Order Management | Define your order taking process and identify where the CRM system will automate workflows. |
| 40% | Processes are documented for Billing | Define your billing process and identify where the CRM system will automate workflows. |
| 40% | Clear metrics exist in each dept to evaluate performance & productivity | Define metrics for performance & productivity for each department and create standard reports in CRM. |

TECHNOLOGY - Data Management & Integration

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|--|
| 40% | Customer information is safely stored in a warehouse or online | Develop a disaster recovery plan for your CEM data by backing up and hosting offsite or online. |
| 40% | Product information is safely stored in a warehouse or online | Consider building a data mart or data warehouse to store all customer opinion related information. |
| 20% | We have one unique customer identifier used across all departments | Standardize on a unique identifier for all departments to promote easy information retrieval. |
| 40% | I/T has taken responsibility for data management across all departments | Work with your IT department to create a data management policy and ensure data stays accurate. |
| 20% | The Sales dept has direct access to an order-management interface | Streamline your new order process by providing Sales with a mobile order entry interface. |



PEOPLE - Enabling Technology

| Maturity | CEM Success Drivers | Recommendations |
|----------|---|--|
| 40% | Budget and resources have been put aside for end-user training & support | Determine the cost of training programs and the staff hours required to set a clear budget for CEM training. |
| 20% | There is enough time for all groups to be trained well in advance | Consider taking a phased approach to training and rolling out the CEM application. |
| 60% | There is staff in place to provide training, support, & system administration | If you haven't already, dedicate a CEM power user or system administrator who will "own" the system. |
| 40% | Job descriptions for Sales Support staff have been created & positions filled | Use our Director, Sales Support and CEM Administrator job descriptions to document responsibilities. |
| 20% | There is a clear knowledge transfer plan from consultants to managers | If you are working with a consulting firm ensure that they have a clear knowledge transfer methodology. |
| 20% | Our CEM system provides a clear service level agreement | Before committing to a purchase of a CEM application, ask to see their service level agreement policy. |



PEOPLE - Technology User Adoption

| Maturity | CEM Success Drivers | Recommendations |
|----------|--|---|
| 40% | Senior management has mandated that end users adopt the system | As user adoption is critical for the success of the application, have senior leaders mandate usage. |
| 40% | User Adoption reports are generated and fed back to senior management | Create a monthly report to demonstrate what percentage of users are regularly using the system. |
| 20% | Post-training job aids and support tools are provided to all end users | Develop cut-sheets and paper based training documents to reinforce classroom training on the job. |
| 40% | Coaching and quality assurance processes are in place & are measurable | Audit the data going into the CEM system and add data quality as a metric in your QA program. |



CEM SUGGESTIONS

The key to effective CEM is to enable your organization to capture, monitor and analyse an entirely holistic, 360° view of the customer experience. This view, once achieved, can be used to extract truly valuable rel-time insights, which can be used to make strategic business decisions.

SandSIV provides an extensive set of related technologies to enable business to achieve this level of CEM maturity and begin to reap the major benefits that only true CEM maturity can deliver, and these include:

- **VOC Hub** – Our core technology, which acts as a unified hub for all CEM activities across the enterprise
- **VOC Feedback** - Capture Voice of the Customer feedback via surveys which can be deployed across multiple channels, and in multiple languages.
- **VOC Visual** - A unified dashboard the can deliver real-time, actionable insights into the current customer experience.
- **VOC Mine** – Our text analytics engine, capable of data mining across the whole range of big data that your company may capture.
- **VoC Classify** – An advanced language agnostic text classification engine that uses statistical algorithms to classify thousands of customer feedbacks a second.

If you would like to know more about the products and services that SandSIV offers, then please contact us. We will be happy to discuss your current CEM position and highlight any ways in which we can help you achieve true CEM maturity.

ASSISTANCE

The success of your company depends on your availability to understand what your customer want and on your ability to deliver what they want. Today most companies do not really listen to their customers in their CE design and delivery. So how about you, is your customer experience designed around your customers' opinions and needs?

SandSIV will, in close cooperation with you, redesign your CE focus based on customer's view and on the critical issues encountered in customer's feedback.

SandSIV helps organizations to develop their own customer experience strategy, defining the vision of the strategic roadmap, charting the major processes and rules of the organization, while measuring and controlling by means of performance indicators, including measuring VOC.

Leveraging our unique technology and the know-how of our consultants enables us to deliver a strong solution to redesign your CE. Our executive members have led multiple companies to become successful in CEM. We orchestrate a combination of customer experience, analytics, service, process and IT expertise to put you in a position to achieve your business goals.



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customer intelligence **made in switzerland**

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