



Customer Experience Optimization



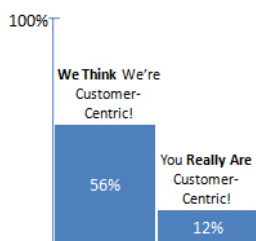
Differentiation through Customer Experience Optimization

ClearAction customized consulting and mentoring services

Customer Centricity Goes Beyond CX Management

While 56% of managers think they're customer-centric, only 12% of their customers agree.

81% of companies with strong capabilities and competencies for delivering customer experience excellence are outperforming their competition.



Aligning Business to Customer Preferences

To differentiate customer experience, do something your competitors aren't doing in customer experience management. Re-examine how you're listening to customers, viewing customers' expectations, and focusing your employees and business rituals on customers.

ClearAction is a customer experience optimization consulting firm that guides company-wide action on a clear view of customer intelligence. Customer experience optimization goes beyond the revenue-focus of customer experience management, to grow both revenue and profit naturally through company-wide alignment with buyer priorities.

ClearAction's depth of practitioner experience since 1989:

- Inspires employees to take the customer perspective — know your customers' world better than competitors do.
- Instills customer-focused decision-making as a habit among all employees — motivate customer experience optimization as a way of life.
- Engages employees to resolve and prevent customers' issues — collaborate cross-organizationally for company-wide customer experience excellence.

"ClearAction has taught us things that would not readily cross our minds; they make total sense, and have increased our efficiency and accuracy in many areas."

— K. van Diepen, Director of Marketing

Customer experience optimization (CXO) differs from traditional approaches to customer experience management (CEM) by balancing *revenue-focused* customer touch-point excellence with *profit-focused*, company-wide operational alignment to what matters to customers.

What matters to customers is defined primarily by *customer-initiated*, rather than company-initiated inputs; most customers will readily share extensive feedback if they are asked in a way that matches their preferences, rather than the way the service provider company thinks they should collect feedback.

Customers make paychecks and budgets possible, and shareholders leave when customers leave — not the other way around. Hence, profits as the purpose of a business is a misnomer — every organization, and every job, exists to serve a customer need — and profits are a necessary and desirable byproduct of meeting those needs both effectively and efficiently.

Therefore, CXO positions customer experience inputs as *determinants*, rather than a subset of corporate strategy. To do this, the nature of customer experience (CX) inputs must support information needs of the strategic planning process as well as key responsibilities of each functional area, such as hiring, training, recognition, incentives, reviews and promotion of people; policies, billing, reporting, and investing of finances; and similarly, the various components integral to IT, safety, quality, manufacturing, engineering, service, and so forth. *Employee engagement and accountability* for action-plan follow-through company-wide are also essential to CXO.

- *Customer Experience* includes all of the steps a buyer takes to get and use a solution from the time of the buyer's realization of a need until the buyer deems the need no longer exists.
- *Customer Experience Management* is a composite of customer management efforts (CRM, VoC, UX, service, loyalty, advocacy, references, touch-points, etc.).

Statistics from CMO Council Customer Affinity study and Peppers & Rogers Customer Experience Maturity Monitor study.

Optimize customer experience with guidance from an experienced practitioner

Maximize morale and accelerate business results by preventing mis-steps and leveraging best-practices.

Lynn Hunsaker, Head of ClearAction

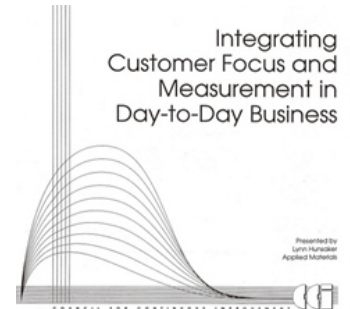
Lynn Hunsaker is founder and president of ClearAction customer experience optimization consulting. She has developed and managed customer experience programs at Fortune 250 companies in roles such as Head of Corporate Quality, Director of Marketing and Business Development, Voice of the Customer Manager, Market Research Consultant, Strategic Information Manager, and Customer Satisfaction Improvement Manager.

ClearAction clients include Accountants Inc, Adecco, Anritsu, Applied Materials, Cadence, Cisco, Critical Software, Delttek, Direct General Insurance, FormFactor, Hospira, Ingersoll Rand, Kaiser Permanente, Merck, MicroWarehouse, SPG Prints, SunPower, Thomson Reuters, Valin, Whataburger, Zenprise and others.



Extensive Practitioner Experience

At Sonoco, Lynn led a taskforce to develop a 20-country multi-division customer satisfaction survey methodology in 1991, improved multi-year survey efficiency by 50%, and conducted hundreds of personal interviews at customer sites as inputs to the annual strategic planning process. Starting in 1994 at Applied Materials, Lynn conducted customer experience action planning workshops with 50 business units and deployed extensive internal branding to engage employees company-wide in owning the customer experience. She also designed and conducted focus groups and customer feedback instruments for marketing, service, product development, and operations.



ClearAction is a Founding Corporate Member of the Customer Experience Professionals Association. Lynn is one of ten CXPA Customer Experience Experts, volunteering advice to members' questions. She has participated on the Education committee and moderated a B2B CEM discussion at the Members' Insight Exchange, and Lynn has contributed three CX Tools to the CXPA:

- Customer Complaint Management to Maximize CEM ROI
- Voice of the Customer Action Plans Focusing on Leading Indicators
- Calculate Your Organization's Customer-Centricity



Lynn founded the Annual ClearAction Business-to-Business Customer Experience Management Best Practices Study in 2010. She has been a CustomerThink top-10 customer experience author, and she has been a board member of The Customer Care Network, CustomerThink, and Marketing Operations Partners. She is past-president of the Bay Area chapter of Association for Psychological Type and Silicon Valley chapter of American Marketing Association. Lynn is a Certified Professional Marketer (AMA), Certified Quality Manager (ASQ), and Certified MBTI® Practitioner (CPP). She taught advertising, marketing and business courses at UC Berkeley Extension, SJSU, and Mission College. She earned psychology and marketing degrees from BYU, and her MBA degree from Vanderbilt University.

Lynn Hunsaker has written and published three handbooks:

- *Customer Experience Improvement Momentum*
- *Metrics You Can Manage For Success*
- *Innovating Superior Customer Experience*



ClearAction's network of virtual teammates meets your needs economically.

ClearAction customer experience optimization consulting guides company-wide action on a clear view of customer intelligence.

Optimize customer experience with guidance from an experienced practitioner

Our strategists have been in your place: influencing their companies to achieve significant customer experience goals.

Carol Borghesi, Customer Experience Optimization Strategist

Carol Borghesi helps our clients put the customer first for fun and profit. She has developed and managed customer experience programs for over 30 years at TELUS in Canada, Bharti Airtel in India, and British Telecom in the UK. Her roles included Senior Vice President of Client Experience, Senior Vice President of Customers First Culture, Director of Customer Service, and Managing Director of 21st Century Customer Experience. With senior roles in sales, service and business unit management, Carol has successfully managed change through deregulation, labor relations and rapid technological innovation, in distinctly different markets and operational scales, delivering superior results for customers.



At TELUS, Carol ignited passionate customer advocacy company-wide. At Bharti Airtel, she implemented several major systems, including CRM, and managed six outsourcing partners while the customer base grew from 26 million to more than 60 million. At BT, Carol ran their newly formed telemarketing operation of 7,500 people serving 22 million customers. Her Customer Service role led a workforce of 22,000 in sales, service, repair, operator services and directory assistance. She led BT's largest customer management transformation program, improving customer satisfaction and reducing costs by 150M pounds in three years, by consolidating 150 call centres across 104 locations to 33 centers, as well as acquiring a business and adding two offshore operations in India. Her team leveraged next generation network investment across BT's wholesale, global and retail lines of business. In BT Global Services team she provided operational insight to ICT solutions for major organizations in utilities, finance and other service intensive industries. Carol is a graduate of the British Columbia Institute of Technology, and she is past Chair of the UK Customer Contact Association.

Jim Rembach, Customer Experience Optimization Strategist

Jim Rembach helps our clients engage employees, collaborate cross-functionally, build customer-focused culture, and engage customers. He has managed customer experience programs at Autozone and Deluxe Financial Services, where he led the daily operations of a staff of 800 and led a technology assessment for a \$14B manufacturer. He is founder of BeyondMorale, where he uses a psychologist-invented system called servant teamwork that is infused with proven methods in neuroscience and adult learning that has been used by companies like Pepsi, AstraZeneca, BAE Systems, and Black & Decker.



Jim is a featured contributor to the Workforce Development Community for the American Society for Training & Development (ASTD). He has been a guest lecturer on organizational behavior and management communication at UC Berkeley Extension and University of San Francisco. Jim is a frequent speaker and an author and reference source in numerous publications and articles. He has been a regional director of **Contact Center Network Group** for 12 years, and is a **CXPA Ambassador** and **Customer Experience Expert**.

Kay Jackson, Customer Experience Optimization Strategist

Kathryn Jackson, PhD, helps our clients improve call center performance and customer service training, benchmarking, and technologies. She began her call center management career in 1983, including Customer Service Manager roles at Teknekron Infoswitch and at Consumer Health, where she helped build the call center from scratch. Her specialties include call center performance management, customer service training, benchmarking, and technologies. Kay is founder of ResponseDesign and ResponseLearning and has consulted companies across many industries for the past 12 years. She is also founder of Mach4um call center performance communities.



Kay's groundbreaking research into topics like the integration of the Internet into call centers and complaint management has brought important new insight to the industry. And her expertise proved essential to the study of the customer-centric revolution by the American Productivity & Quality Center (APQC; a not-for-profit organization that spearheaded the Malcolm Baldrige National Quality Award). She has written articles for multiple trade magazines and was asked by Fortune Magazine to author its international call center supplement. She wrote two chapters of the Quality Audit Handbook published by the American Society for Quality (ASQ). She received the Call Center Pioneer Award from Call Center Magazine, which inducted her into its Hall of Fame. She also currently serves as a member of the Call Center Leadership Council.

Optimize customer experience with guidance from an experienced practitioner

Our first-hand knowledge of your challenges can give you the upper hand in achieving business results.

Lacey Grey, Customer Experience Optimization Strategist

Lacey Grey helps our clients increase cross-organizational engagement and leverage customer value analytics. She has developed and managed customer experience programs at Merck, MFG.com, HomeBanc Mortgage, and Earthlink. At Merck, she aligned executives and cross-functional teams around strategy and implementation to improve employee engagement scores by 10%. At MFG.com, she created customer analytics, prioritization and valuation approaches and led the transformation from reactive Customer Service to proactive Account Management, working closely with Information Technology to develop a proprietary system to facilitate this transformation.



As VP of Customer Retention at HomeBanc, Lacey led the customer prioritization and Net Promoter Score programs and increased organic revenue by 10% through multi-channel marketing and segmentation. In her role as Chief Customer Officer at Earthlink, she managed multi-national retention contact centers, increasing the retention rate from 9 to 32%, and she increased customer tenure by 26% through management of the customer experience and loyalty marketing. Lacey earned a black belt and executive belt in Six Sigma. She is the principal and founder of Customer Value Growth.

Roberta O'Keith, Customer Experience Optimization Strategist

Roberta O'Keith helps our clients improve capabilities for systematic resolution of customer issues, and nurture customer-focused culture and customer experience business results. She has managed customer experience, marketing, and quality at General Electric, Individual Assurance Company, and Bankers Life & Casualty. Her roles included Vice President of Business Intelligence, AVP of Business Development, Lean Six Sigma Master Black Belt for Customer Insights, New Product Development Manager, Provider Relations Manager, Customer Lifecycle Marketing Manager, and Customer Insights Leader.



Roberta is a Certified Business Coach through the Institute for Professional Excellence in Coaching. She is a frequent speaker on customer experience and is a recipient of the GE Imagine Award and GE Business Impact Award. Roberta earned her MBA degree at Benedictine University and BS degree at Western Illinois University. She is a member of the **Board of Directors** for the Customer Experience Professionals Association (CXPA).

5 Myths to Consider in Developing Your Customer Experience Strategy Roadmap

Myths	Truths
<i>Myth:</i> "Everyone's doing it, so it must be the best way to proceed."	<ul style="list-style-type: none">• Differentiation means: do it differently• Culture requires extensive groundwork• Prepare to hear as customers prefer• CX worsens by re-asking before fixing
<i>Myth:</i> "By publicizing good survey results we'll grow revenue."	<ul style="list-style-type: none">• Customers expect action on feedback• Disgruntled customers: more vocal• Focus on wrong questions/answers• Less profit via wasted investment
<i>Myth:</i> "Our survey/technology provider is full-service."	<ul style="list-style-type: none">• Full scope = area of specialty• In-the-trenches background needed• Cross-pollination is healthy
<i>Myth:</i> "Communities, CRM, EFM, touch-points, social, loyalty are hottest."	<ul style="list-style-type: none">• "Lipstick on pig" is not strategic• Hassles cause most turnover• Prevent issues for word-of-mouth• Natural growth: most sustainable
<i>Myth:</i> "It's best to start with something tangible & figure it out as we go."	<ul style="list-style-type: none">• Mis-steps lower morale/credibility• Business-as-usual: not strategic• Setup people/processes for success• CX is not a trivial "football"

Customer experience management is necessary, yet insufficient.

Leapfrog your competitors through customer experience optimization.

ClearAction provides customer experience optimization (CXO) mentoring, training, and customized services.

Customer Experience Optimization is company-wide alignment with buyer priorities to grow both revenue and profit naturally.

Align to buyer priorities by 1) taking the customer perspective, 2) making customer-focused decision-making a habit, and 3) resolving and preventing issues for customers cross-organizationally.



1) Inspire employees to take the customer perspective. Know your customers' world better than your competitors do.

- Customer Experience Management**
- Mindset:*
- How the company is doing
 - How the company can increase revenue

- Typical Tools:*
- Surveys, listening posts
 - Advisory boards, user groups
 - Positive word-of-mouth, promoters
 - Social media, communities
 - References, buyer personae

- Customer Experience Optimization**
- What the customer is doing & why
 - How the company can contribute to well-being

- Text mining, voice mining, data integration
- Complaints, cost-benefit perceptions
- 360-degree view of customers' world
- Jobs-to-be-done segmentation
- Customer experience personae



2) Instill customer-focused decision-making as a habit among all employees. Motivate CXO as a way of life.

- Customer Experience Management**
- Mindset:*
- What customer-facing employees should do
 - How the company can increase revenue

- Typical Tools:*
- Key drivers of customer perceptions
 - Touch-point improvement
 - Customer journey maps
 - Front-line training
 - Customer loyalty management

- Customer Experience Optimization**
- What all employees should do
 - How the company can increase profit

- Customer-focused roles & competencies
- Customer-focused individual & organizational reviews
- Customer-focus training company-wide
- Customer-focused motivation & incentives
- Self-awareness of stakeholder perceptions



3) Engage employees to resolve & prevent issues for customers. Collaborate cross-organizationally for CX excellence.

- Customer Experience Management**
- Mindset:*
- Resolving issues at touch-points
 - How the company can increase revenue

- Typical Tools:*
- Closed-loop survey responses
 - Customer loyalty programs
 - Brand advocacy
 - CRM technology
 - Personalized marketing

- Customer Experience Optimization**
- Preventing issues for all buyers
 - How the company & customers can mutually increase value

- Closed-loop systemic issues
- Cross-functional collaboration to transform CX
- Ongoing adaptation of company to customers
- Customer experience informs all strategies
- Pre- and post-purchase CX innovations

Customer experience management is necessary, yet insufficient.

Customer experience optimization efforts can work in lieu of or in concert with customer experience management efforts.

Note: ClearAction does not provide survey management or technology solutions. Our work seamlessly augments your existing customer experience efforts and/or helps you navigate your options to create a methodology that best fits your customers.



ClearAction offers mentoring, train-the-trainer and offsite/onsite consulting in these topics:



Customer-Aligned Perspectives

Inspire employees to take the customer perspective.

- What the customer is doing & why
- How the company can contribute to well-being

- Customer Data Integration
- Systematic Complaint Resolution
- Customer Value Quotients
- Customer World Perspective
- Customer Experience Personas
- Customer Experience Coaching
- Customer Program Review



Customer-Aligned Decisions

Instill customer-focused decision-making as a habit.

- What all employees should do
- How the company can increase profit

- Customer Experience Value
- Customer Experience Excellence Vision
- Nurture Executive Sponsorship
- Holistic Decision-Making
- Internal Branding
- Customer Stories
- Speak Stakeholders' Language
- Stakeholder Engagement
- Customer-Focused Roles
- Customer-Focused Reviews
- Customer-Focused Behavior
- Customer-Focused Motivation
- Customer-Focus Incentive Strategies



Customer-Aligned Actions

Engage employees to resolve & prevent issues for customers.

- Preventing issues for all buyers
- How value can be mutually increased

- Systemic Voice-of-Customer Action Plans
- Touch-point Value Chains
- Internal Customer Deliverables
- Customer Experience Champions
- Customer Experience Governance
- Cross-Organizational Collaboration
- Self-Reporting Team Recognition
- Customer Experience Innovation
- Use Voice-of-Customer in Strategic Plans
- Process Maturity Ratings
- Leading/Lagging Indicators
- Act on Multiple Voices
- Multiple Functions in B2B Journey
- B2B Post-Purchase Touch-points

Customer Relationship Skills Training

- The Power of Listening
- The Power of Questions
- The Power of Intended Outcomes
- Balancing Open Dialog
- Interaction Bridges™
- Personalities Under Stress
- Building Trust
- Partnering Roles
- Sources of Influence
- Building Client Relationships
- Stakeholder Management
- Building Relationships with Each Buying Influence
- Creating Value through Systems Thinking
- Learning from Challenges & Successes
- Mastering Implementation