

## 2013 Executive Summary

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# 4<sup>th</sup> Annual ClearAction Business-to-Business Customer Experience Management Best Practices Study



[www.ClearAction.biz](http://www.ClearAction.biz)

# About the ClearAction Business-to-Business Customer Experience Management Best Practices Study

The Annual ClearAction Business-to-Business Customer Experience Management Best Practices Study monitors the implementation of best practices in customer-focused management for sustainable profitability.

This is a study of the journey to world-class performance in how business-to-business firms (1) listen to customers, (2) view customers, (3) center employees on customers, and (4) center business on customers. It explores the motivations behind customer experience management (CEM) and its linkages to corporate goals, strategy, culture, processes, and business results.

Managing B2B customer experience can be quite challenging, with high involvement of numerous influencers of the purchase decision, high-stakes purchases with lengthy sales cycles, reciprocal buyer/supplier relationships, and complex touch-points across functional areas, managerial levels, and products, among other factors unique to B2B environments.

What's new in 2013:

- 10 questions unique to B2B CEM
- A CEM strategy model
- Analysis by groups of related CEM efforts to show context & linkages
- Extensive recommendations
- Presentation format

Past studies:

- 2012: featured trends and B2B CEM success stories.
- 2011: discovered six key drivers of B2B CEM success.
- 2010: analyzed deployment scope and functional areas driving CEM.

This study was conducted by ClearAction customer experience optimization consulting. ClearAction maintains sole responsibility for the research, analysis, and recommendations in this report. We thank all of the study participants for sharing, and we appreciate CustomerThink for helping to generate widespread awareness of this study.



ClearAction is a customer experience optimization consulting firm that guides company-wide action on a clear view of customer intelligence. CX optimization aligns organizations with customer expectations, to minimize hassles, for natural customer enthusiasm, sustainable differentiation and growth of profit as well as revenue. <http://ClearAction.biz>



CustomerThink is a global online community of business leaders striving to create profitable customer-centric enterprises. Each month, the site reaches 200,000 subscribers and visitors from 200 countries via email, RSS, LinkedIn and Twitter. CustomerThink currently serves over 80,000 visitors per month. <http://CustomerThink.com>.

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# 6 Success Factors for Customer Experience Management

To identify the success factors for CEM, we focused on companies reporting strong business results in our 2011 study. For example, some companies attributed CEM to their financial progress, such as 200% increase in market share over the past four years or 20% improvement in revenue over the past year. Some companies mentioned figures such as 15% reduction in churn and so forth.

Among the companies with strong business results, we identified the group that also had strong performance of at least 20 percentage points advantage in CEM practices. Six practices were strongly correlated to business results as well as holistic CEM:

1. Coordination among managers of CEM methods
2. CEM as a determinant of corporate strategy
3. Presentation of survey results to all employees
4. Calculation of customer lifetime value
5. Actions on survey results by owners of CX drivers
6. Funding of cross-organizational CEM collaboration

To illustrate, among companies whose managers of various customer experience activities coordinate by reporting to a single department (or to a committee or executive, or meeting quarterly or more often), that group of companies is more likely (by least 20 percentage points) to collect voice of the customer from all influencers in the purchase decision, to capture front line employees' observations, and to capture customer complaints, in addition to many other CEM practices. The advantages across so many practices infers that a more holistic customer experience management effort is in place. This is true when each of these 6 success factors is in-play.



## #1 Coordination Among Managers of CEM Methods

Do managers of your top 5 methods to improve CX report to a single department or by dotted line, or meet often, or not?



## #2 CEM is a Determinant of Corporate Strategy

What is the role of CEM in strategic planning, as evidenced by top management's actions: Is CEM not relevant, or a subset of strategy, or a determinant of corporate strategy?



## #3 Presentation of Survey Results to All Employees

Do you provide VOC reports to all employees, or some managers, or only execs, or only customer-facing employees?



## #4 Calculation of Customer Lifetime Value

Is your practice of CLV calculation world-class, well-established, just starting, on your wish list, or not planned?



## #5 Action on Survey Results by Owners of Key CX Drivers

Do you assign actions for CX improvement to departments that own the CX key drivers?



## #6 Funding of Cross-Organizational CEM Collaboration

Has funding of cross-organizational CEM collaboration in the past year increased, remained the same, or decreased?



# 4<sup>th</sup> Annual ClearAction B2B CEM Best Practices Study

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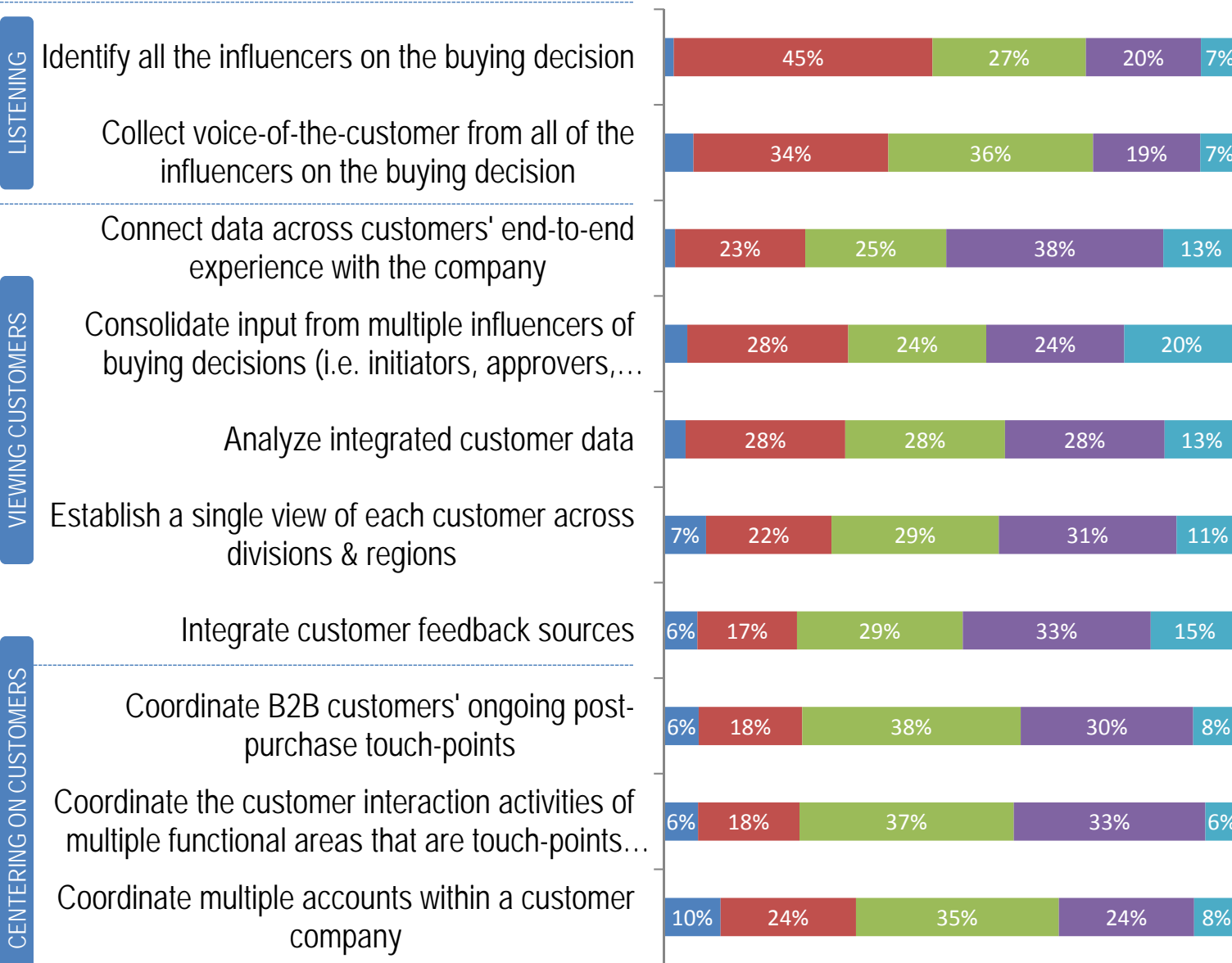
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# Executive Summary

■ Perhaps World-Class ■ Well-Established ■ Just Starting ■ On Our Wish List ■ Not Planned/Unknown



In the 2013 ClearAction Business-to-Business Customer Experience Management Best Practices Study, ten questions measure challenges specific to B2B CEM. Here are highlights:

- **Identifying all the influencers of the buying decision:** half of participants are well-established; one-fourth are not yet doing this.
- **Collecting input from all influencers of buying decisions:** a third are well-established; one-fourth are not yet doing this.
- **Integrating data from multiple sources, across divisions and regions, and the end-to-end journey:** one-fourth are well-established; one-fourth are just starting these practices; 40-50% of participants are not yet doing this.
- **Coordination of interactions:** one-fourth are well-established; a third are just starting, and a third are not yet doing this.

Clearly, B2B CEM is making strides, yet significant room for improvement exists in proactively managing complexities of B2B relationships.



**2013 Highlights:**

All of the other questions on the survey are universal to B2C and B2B CEM. B2B firms need to adopt a CEM strategy model, with logical building-blocks toward business results. The 6 CEM success factors must be embraced, with far greater change management.

**1) Duration & Scope of B2B Customer Experience Management**

High-touch and multiple decision makers are cited as the primary unique factors for B2B CEM, among companies that also serve B2C markets.

20-50% of B2B companies have managed the following CEM efforts for 10 or more years: branding, complaint resolution, retention, references, service excellence, customer care, experiential marketing, loyalty, CRM, co-innovation.

**2) Motivations for B2B Customer Experience Management**

Revenue, share of budget, and differentiation are primary B2B CEM motivators.

Lack of CEM strategy and executive sponsorship are obstacles to success.

Many executives discount the value of VoC and see CEM as a subset of strategy.

**3) Journey to World-Class in Listening to Customers**

Half of the participants monitor overall relationship and/or transactions, and involve executives in listening to customers. VoC intent is not yet to transform business-as-usual.

**3) Journey to World-Class in Viewing Customers**

A minority of participants integrate data, coordinate interactions, or know lifetime value.

**4) Journey to World-Class in Centering Employees on Customers**

40% of participants present VoC to all employees and expect action on key drivers.

**5) Journey to World-Class in Centering Business on Customers**

Half of participants resolve non-survey complaints and manage closed-loop improvement.

Tools and technologies for facilitating and embedding CEM should be put into use.

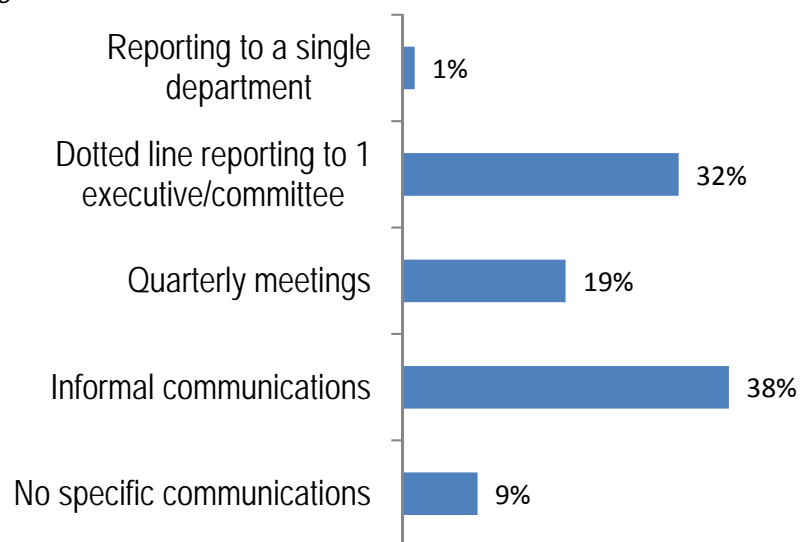
This report zeros-in on clusters of CEM efforts, to show context and linkages among those activities. Extensive recommendations are provided throughout the report.

**B2B firms using CEM practices for at least 5 years:**

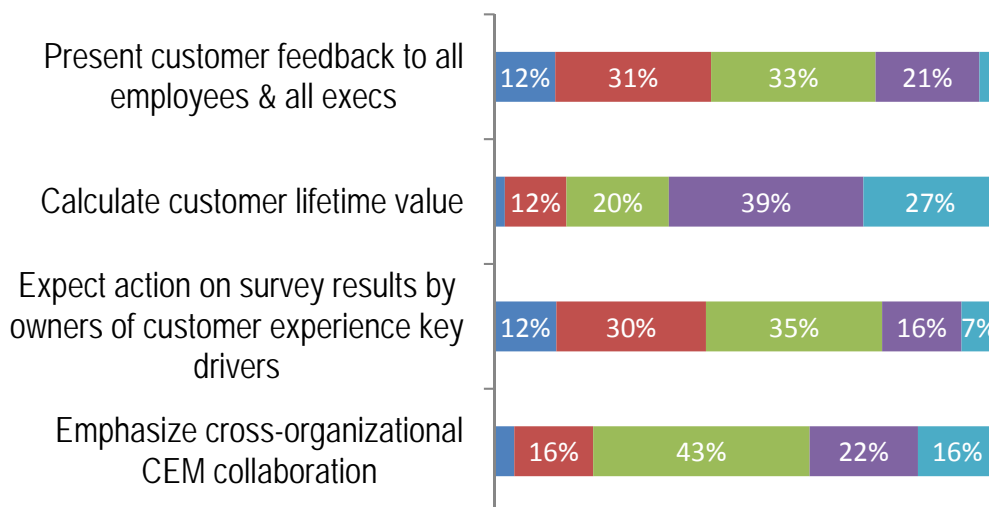
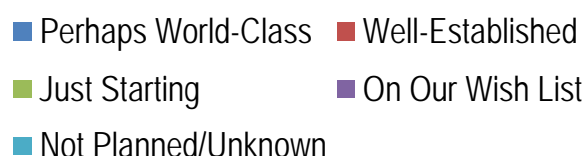
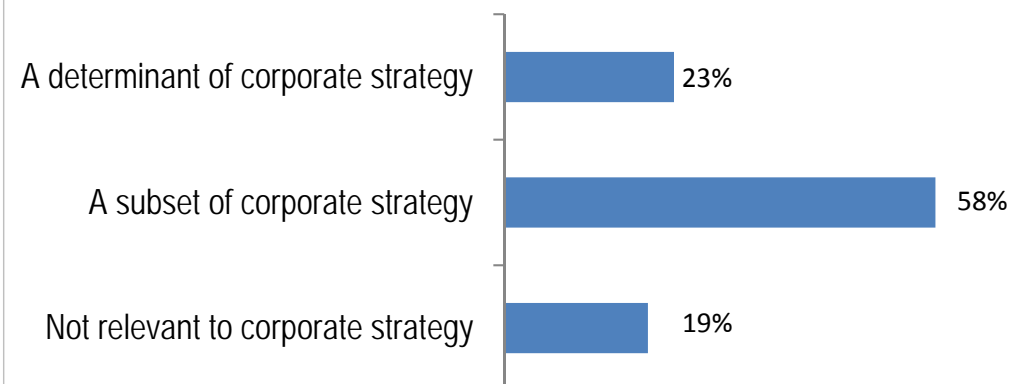


B2B firms' performance on the 6 CEM success factors: more awareness of these factors and a holistic, strategic approach are needed.

*Managers of CX efforts coordinate via:*



*Executives' actions indicate that CEM is :*



**1) Coordination among managers of CEM methods:**

Best results come from formal coordination: 47% of firms still informal.

**2) CEM as a determinant of corporate strategy:**

Best results come from CEM as a determinant: 77% not yet doing this.

**3) Presentation of VoC to all employees:**

43% well-established, 33% just starting, 24% not yet doing this.

**4) Calculation of customer lifetime value:**

14% well-established, 20% just starting, 66% not yet doing this.

**5) Actions on survey results by owners of CX drivers:**

42% well-established, 35% just starting, 23% not yet doing this.

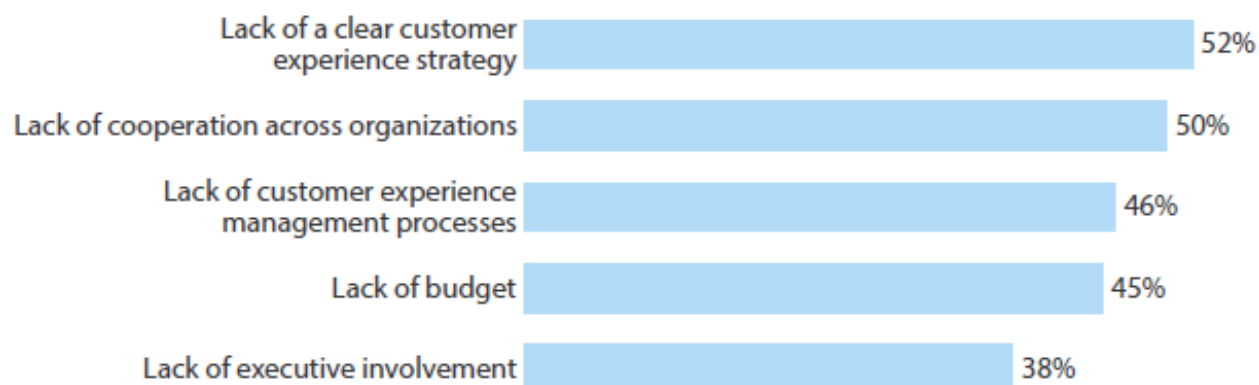
**6) Emphasis on cross-organizational CEM collaboration:**

19% well-established, 43% just starting, 38% not yet doing this.



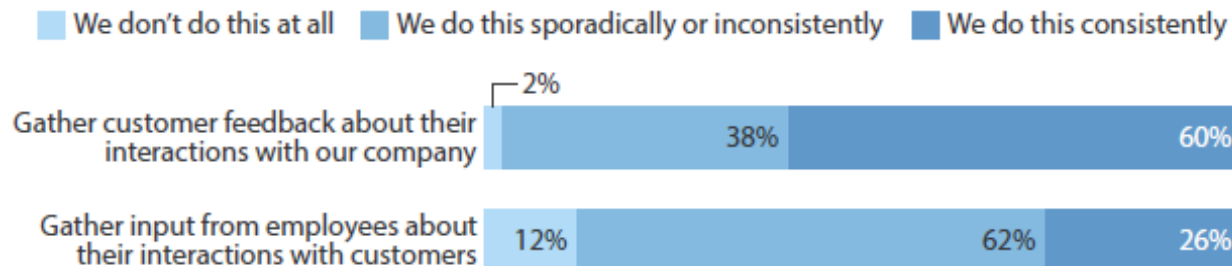
## B2B CEM compared to B2C CEM:

**"Which of the following are significant obstacles to improving the customer experience your company delivers?"**  
(Select all that apply)



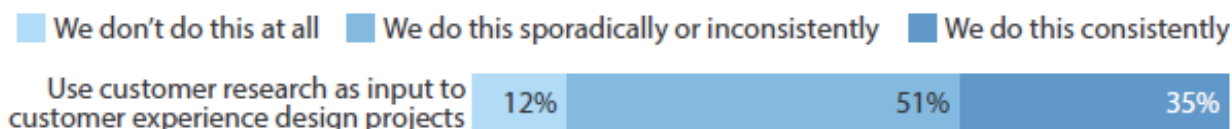
Forrester Research: 2013 State of Customer Experience

**"To what extent does your company do the following practices related to customer understanding?"**



Forrester Research: 2013 State of Customer Experience

**"To what extent does your company do the following practices related to design?"**



Forrester Research: 2013 State of Customer Experience

In comparison to the 2013 Forrester State of Customer Experience survey responses, the 2013 ClearAction State of B2B CEM survey indicated:

Similar percentages for B2B firms' top 5 obstacles to the success of customer experience goals:

- 49% lack of clear customer experience strategy
- 44% lack of cooperation across organization
- 42% lack of budget
- 40% lack of executive sponsorship

Similar percentages for B2B firms' monitoring of customer perceptions of transactions:

- 53% well-established, 20% just starting, 22% have this on their wish list, 5% have no plans to do this

Roughly similar percentages for B2B firms collecting front-line employees' observations of customer sentiment:

- 16% well-established, 41% just starting, 31% have this on their wish list, 11% have no plans to do this

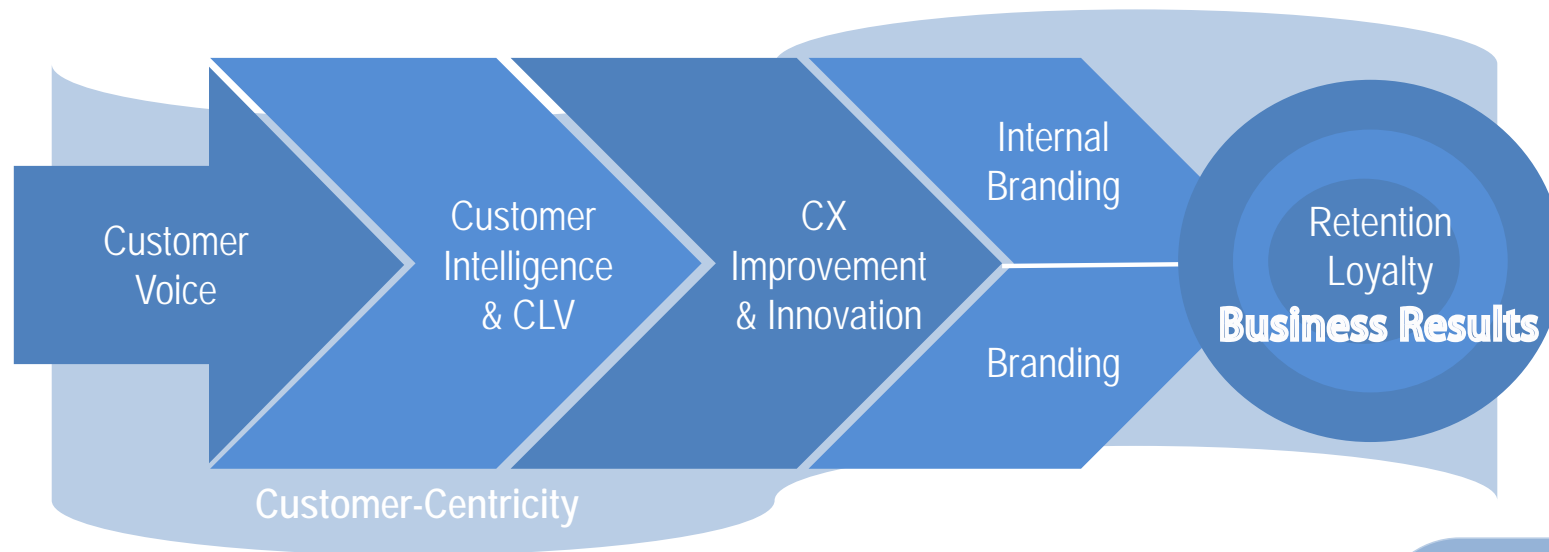
Similar percentages for B2B firms listening to customer needs prior to product development:

- 42% well-established, 26% just starting, 23% have this on their wish list, 9% have no plans to do this





# Requirements for Customer Experience Management Strategy



## C<sup>4</sup>:

- Customer voice
- Customer intelligence
- Customer lifetime value
- Customer-centricity

### 6 CEM Success Factors:

- Calculate CLV
- Coordinate Managers of CX

## I<sup>2</sup>: CX IMPROVEMENT + CX INNOVATION

(i.e. acting on intelligence & CLV)

Includes:

- VoC action plans
- Touch-points
- Journey maps
- User experience
- Co-innovation
- Complaint resolution
- Service excellence
- Customer care

- Present VoC to All Employees
- VoC Action on CX Key Drivers

## B<sup>2</sup>: BRANDING & INTERNAL BRANDING

(i.e. making + keeping promises)

Includes:

- Internal customer satisfaction
- Employee engagement
- Experiential marketing
- References
- Community
- Advocacy
- CRM

- Cross-Organizational Collaboration
- CEM as a Determinant of Strategy

There is a logical flow to business cause-and-effect and human nature that must be respected in CEM strategies. Focusing on tactics, brute-force business-results efforts, and skipping building-blocks is currently leading to inefficient resource use and distrust, with suboptimal profitability and short-term revenue growth, at best. Follow this model for strong financial results.

### Definitions:

*Customer-centricity = customer well-being at the center of everyone's decisions & actions*

*Customer care = outreach for customers' well-being*  
*Advocacy = word-of-mouth*

*Loyalty = share of budget, recommendations*  
*Retention = relationship duration*



# Methodology

72 business-to-business customer experience practitioners responded to a 25-minute online questionnaire from June through August 2013. All participants sell products and/or services to businesses. Answers apply to the respondents' entire business-to-business organization. Companies with fewer than 100 employees were eliminated from the study analysis.

Participants represent more than 15 industries in North America, Europe, and Asia. Representation is generally balanced across company sizes, selling prices, and sales cycles.

46% of participants have been in a job focused on CEM for 5 or more years; 37% have been in a CEM job for 1-2 years.

The 2013 State of B2B CEM online questionnaire explored B2B organizations' use of CEM techniques for listening to customers, viewing the customers' world, and centering employees and the business on customers. Participants self-reported their use of various techniques as: perhaps world-class, well-established, just starting, on our wish list, or no plans / do not know.

The questionnaire also explored use of CEM technologies and tools for employee engagement and organizational customer-centricity.

In addition, questions covered B2B CEM motivations, obstacles, achievements, reporting structure, and fit with day-to-day business pressures and strategic planning.

Participants were given the option of remaining anonymous. To-date, insufficient self-reporting of industry precludes industry comparisons in the analysis of B2B CEM best practices.

## *Participating industries include:*

Business services, business supplies, computer hardware, computer software, construction, energy/utilities, engineering services, financial/insurance, industrial automation, medical devices/pharma, printing/ publishing, professional services, telecommunications, transportation/logistics.

## *Participating companies include:*

Allstream, Atlassian, Audatex, Ciena, Colt Technology, Domino Printers, EMC, Experian, Fuji Xerox, General Electric, Global Knowledge, Hydro-Quebec, Infosys Lodestone, Lifetech, Mapfra Asistencia, Miller-Heiman, Mine Safety Appliances, Navis, Neustar, Omnitel, Pershing, Qliktech, Sandisk, Sanitop, SAVO Group, Siemens, Simplex Grinnell, Spigit, SunGard, Surgical Information Systems, Walker, Welch Allyn.

## *Job titles of participants include:*

Chief Customer Officer, VP-Customer Experience, VP-Client Services, VP-Global Client Insight, SVP-Customer Success, VP-Sales Ops & Business Development, Head of Quality & Planning, Director-Customer Experience, Director-Customer Experience Specialists, Director-Global Client Insight, Director-Customer Marketing, Director-Strategic Products, Manager-Customer Experience, Manager-Segment Analytics & Loyalty, Manager-Customer Loyalty Development, Manager-Customer Marketing, Manager-Customer Voice, Customer Experience Lead.

All of the items in the questionnaire are substantiated by other studies as best practices. Correlation analysis of strong business results and wider adoption of best practices has identified 6 success factors.



# Glossary of Customer Experience Profit-growing Terms

**Customer Care:** organization's conscience in favor of customers' welfare, & outreach to customers accordingly.

**Customer-Centricity:** degree that customers' welfare is at the center of the solution provider's decision-making & actions.

**Customer Complaint Resolution:** solving issues & communicating solution to complaint originator.

**Customer Experience Improvement:** process-wide problem resolution & prevention.

**Customer Experience Innovation:** designing & implementing novel methods to enhance customer experience.

**Customer Experience Optimization:** profit growth by preventing hassles and waste, for natural customer enthusiasm to buy, recommend, and rebuy

**Customer Intelligence:** customer data integration, mining, analysis.

**Customer Touch Points:** opportunities for customers to interact with you or your messages or products/services (includes life cycle & journey maps).

**Internal Branding:** understanding by each employee, supplier, & alliance partner of their specific impact on external customer experiences.

**Internal Customer Satisfaction:** attention to quality & timeliness of hand-offs between internal departments.

**Service Excellence:** delivery of purchased services or remedial services, or post-sale assistance to customers.

**User Experience:** intuitive/inviting environment for use or exploration/purchase of the product or service, e.g. website.

**Recommendations:** These CX efforts have profit-growing potential because they can minimize mis-alignment of the company with what's important to customers. By focusing the business on making things easier and nicer for customers to get and use the solutions they need to run their business and satisfy their customers most effectively, repurchase and recommendations are a natural result, making marketing, sales, and service efforts more efficient and freeing up resources to add greater value.



# Glossary of Customer Experience Revenue-growing Terms

**Branding:** creating and communicating a distinctive identity.

**Co-Innovation:** joint product development efforts with customers.

**Customer Advocacy:** word-of-mouth promotion of a brand by enamored customers.

**Customer Community:** opportunities for customers to engage with one another.

**Customer Experience Management:** revenue growth by managing customers' propensity to buy, recommend, and rebuy

**Customer Lifetime Value:** profitability of customers' cumulative purchases.

**Customer Loyalty:** efforts to expand customers' share of budget, e.g. move toward sole supplier status.

**Customer References:** testimonials from customers.

**Customer Relationship Management:** CRM, customer facts/transactions database for personalized communications, upselling, cross-selling, data mining.

**Customer Retention:** efforts to extend a customer's duration of ongoing purchases.

**Voice-of-the-Customer:** monitoring customer sentiment.

**Recommendations:** These CX efforts have revenue-growing potential, and in haste for achieving business results, they are often practiced with minimal profit-growing CX efforts underway. (In daily practice, some of these phrases are used interchangeably; semantics are extremely problematic in the CX field. For clarity among all involved, this study is based on the definitions shown here.) Due to high transparency and customers' sophistication, a solid foundation of profit-growing CX efforts is recommended to build substance from which these sizzle-related outcomes flow naturally.





# Are B2B and B2C CEM Different?

Customer experience management (CEM) of consumers or business clients may seem really different, or essentially the same, depending on your perspective. Customer surveys are a universal CEM practice, and both B2B and B2C companies have been measuring customer satisfaction since the late 1980s and early 1990s, as part of their ISO 9000 and total quality management commitments. Accordingly, customer satisfaction improvement has been an ongoing endeavor for more than 20 years for many companies.

CRM, experiential marketing, word-of-mouth marketing, contact center management, and social media customer service are more obviously applicable to B2C. Hence, these practices have probably been embraced by B2C to a greater extent than B2B. Since these practices have come into vogue more recently than customer satisfaction measurement and improvement, some of us have come to equate CEM with such practices.

However, many B2B firms have always relied on direct sales forces with tighter customer relationships due to lengthy sales cycles and high average selling prices, and ongoing high-touch post-sale. Tighter customer relationship management is what CRM and the rest are really about, right? So let's give B2B credit for their version of these aspects of CEM.

Both B2B and B2C often have a middleman: consumer packaged goods manufacturers reach end-users through retailers; likewise, many B2B companies may sell through value-added resellers or manufacturer agents, or they may make an ingredient that is actually used by the next link in the consumption chain. Both B2B and B2C companies could probably make great improvements in capturing and acting upon voice-of-the-customer from middlemen as well as end-users.

Anything being done inside the company to establish customer-focused culture is universally applicable to both B2B and B2C firms.

Important differences that should be accommodated in B2B CEM include:

- The multiple influencers (end-user, purchasing agent, plant manager, safety department, etc.) of B2B buying decisions infers a need for more complex/comprehensive VoC and internal follow-up on findings.
- The interfaces between functional counterparts (e.g. seller engineers meeting ad-hoc with buyer engineers, not always as a specific step orchestrated by the sales team) at seller and buyer companies is another complexity in the buyer journey and in managing a consistent customer experience.
- Many buyers are also sellers to their buyer.
- B2B buyers are sometimes more influenced by downstream demands and economic factors than by their own whims/preferences.
- B2B companies often have locations around the world, which requires effort to generate consistency of brand and customer experience, yet flexibility for local needs.
- The competitive nature of B2B firms' customers may make "likely to recommend" less relevant than in B2C.

Most of the issues above are managed by \*someone\* in some B2B companies, but rarely by whoever is charged with customer experience management, which tends to have a narrower scope than it should, given the important implications of the above list.

My take: there are few differences in actual practice. Currently, B2B and B2C customer experience managers are essentially doing the same thing. And I think that B2B is not lagging B2C anywhere near the extent that many claim.

*by Lynn Hunsaker, ClearAction Customer Experience Optimization Strategist*



# Model for Customer Experience Management Strategy

Strategy for customer experience management is lacking for most organizations, according to numerous studies, and lack of strategy is a cited widely by customer experience (CX) practitioners as a key obstacle to achieving business results. A close look at the most prevalent CX practices underscores this dilemma: we're "putting the cart before the horse" with near-brute-force on business results and by forgoing the essential building blocks to sustainable CX ROI.

## Truth About Customer Experience Goals

Most of us are pursuing retention, loyalty, service excellence, and customer experience differentiation. Let's explore the nature of these goals:

- Customer retention (duration of relationship) and loyalty (share of budget, recommendations) are outcomes that cannot magically occur through marketing campaigns or enticements, except with short-term spikes.
- Service excellence would be much easier to achieve if routine confusion externally and internally was prevented, freeing up front-line employees to focus on value-add opportunities rather than remedial issues.
- Customer experience differentiation would be more feasible if:
  - Voice-of-the-customer methodology was designed to help the company make necessary transformations.
  - Customer intelligence integrated all sources of CX data for a holistic picture of customers' plight.
  - Everyone across the company had an insatiable curiosity about customers and passion for innovating the customer experience.

## Why the Cart's Before the Horse

Career path biases of CX practitioners, pet projects of executives, ambitious purveyors of CX technologies, and eagerness to embrace shiny silver bullets are some of the perpetrators of the gold-rush strategy for customer experience business results. We need to step back and take a look at logical cause-and-effect of business and human behavior (externally and internally), with a holistic viewpoint, in order to get on the right track toward our goals for differentiation, excellence and financial rewards.

## How to Get Customer Experience Business Results

To put the horse in front of the cart so your customer experience efforts have a fighting chance of making a strategic impact and delivering ongoing business results, develop your CX strategy with the essential building blocks:

- (1) Customer voice
- (2) Customer intelligence and lifetime value
- (3) Customer experience improvement and innovation
- (4) Customer-centricity roadmap
- (5) Internal branding
- (6) Branding

And keep reminding everyone that all 6 of these building blocks must be in-play to achieve sustainable growth (ROI). What will it take to adopt this model in your organization?

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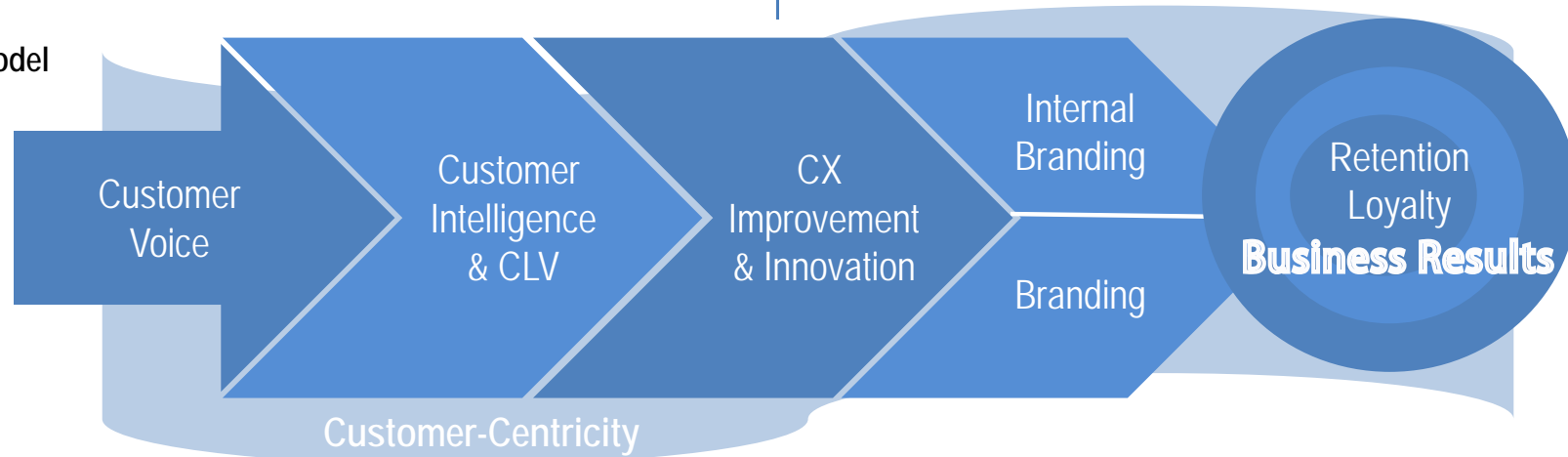


Here are 6 truths:

1. Revenue comes from customers. We are pretty good at “tuning our radar” to what turns on/off our boss who has power over our salary and career progress, so it makes sense to likewise tune our radar to our ultimate boss: customers.  
-- This is the **Customer Voice** building block.
2. Collation and interpretation of data picked up by our radar becomes valuable intelligence, and if we can quantify the value of our relationships, we're equipped with the necessary knowledge and motivation to adjust our behavior to what's needed for success with our boss.  
-- This is the **Customer Intelligence & Customer Lifetime Value** building block.
3. Dedication and creativity allow us to improve and innovate ourselves and our situation so that the boss sees us as indispensable to our collective success.  
-- This is the **CX Improvement & Innovation** building block.

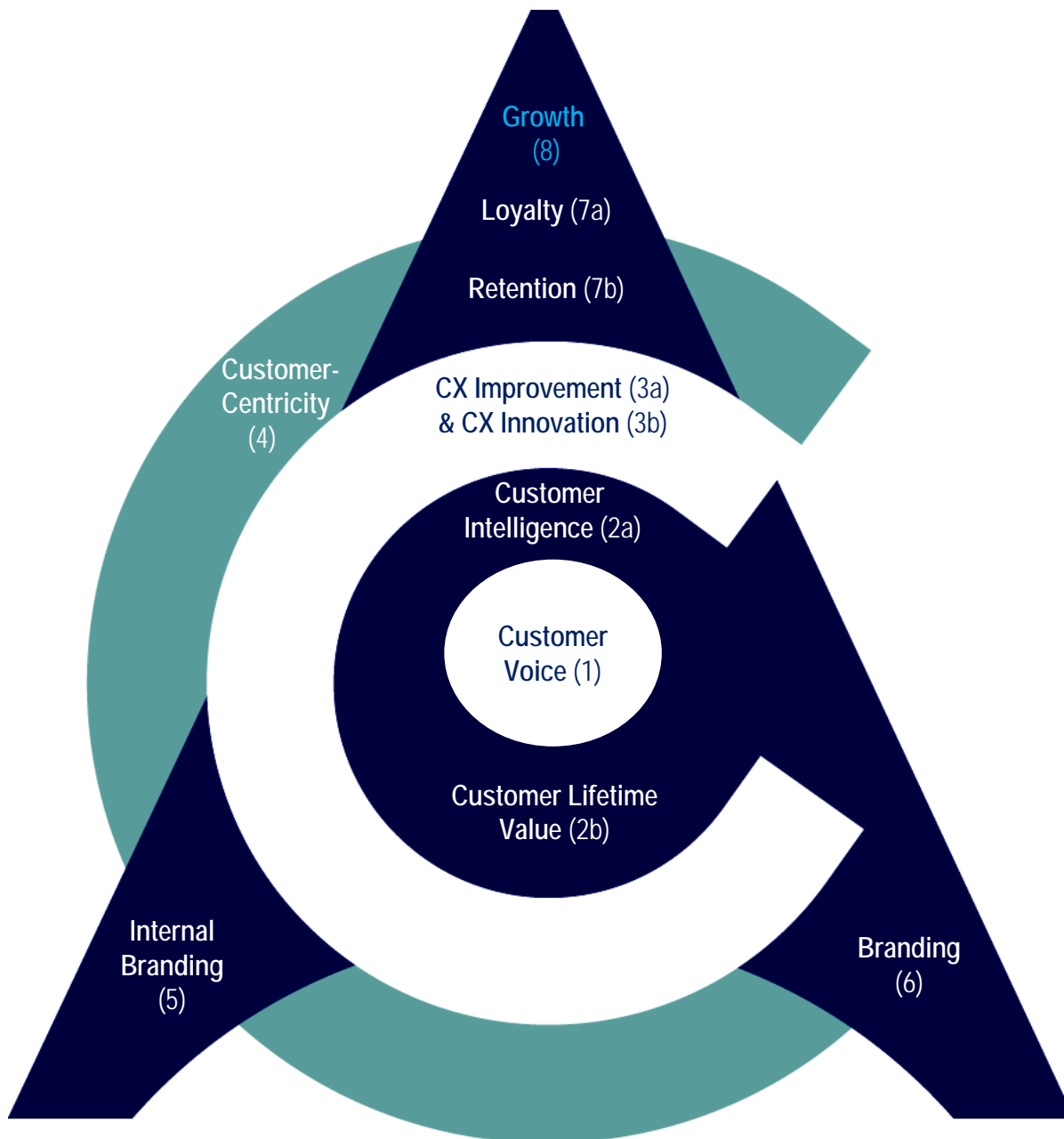
4. Keeping our boss' well-being at the center of our decisions and actions gives us a secure backdrop for moving things forward on-the-fly and for being in the right place at the right time to make the most of the best opportunities.  
-- This is the **Customer-Centricity** building block.
5. It certainly makes sense to center our teams accordingly: get everyone on the same page with regard to what makes the boss tick and how their work impacts the boss' well-being and our collective success, and to engage everyone in proactively managing their work for the best outcomes.  
-- This is the **Internal Branding** building block.
6. With all these building-blocks in place, now you can feel at ease to toot your own horn. Let your stakeholders know about the great things you're capable of providing, and make it compelling for them to help themselves through your capabilities.  
-- This is the **Branding** building block.

CEM Strategy Model



**Important Note:** It is through these 6 building blocks that sustainable retention and loyalty are achieved. Like so many laws of nature, one cannot short-circuit this process and expect lasting results. In fact, attempts to leapfrog any of the building blocks will likely lead to inefficient resource use and customer distrust, with suboptimal profitability and short-term revenue growth, at best.





## Model for Customer Experience Management Strategy

This model illustrates the coordinated efforts required in CX optimization strategy:  $C^4 + I^2 + B^2 = \text{Business Results}$

### BUSINESS RESULTS:

*Aim:* Growth of profit & revenue  
via **Loyalty** (i.e. share of budget, recommendations)  
x **Retention** (i.e. relationship duration)

### $C^4$ :

$C^4$ : Customer-Centered, Customer Voice, Customer Intelligence, Customer Value

- *Command Module:* **Customer Voice**
- *Propellant:* **Customer Intelligence** (VoC & ops/market data) + **Customer Lifetime Value** (CLV)
- *Parachute* (for safe landings): **Customer-Centricity** (i.e. customer well-being at the center of everyone's decisions & actions)

### $I^2$ : CX IMPROVEMENT + CX INNOVATION

$I^2$  Engine: **CX Improvement + CX Innovation**

(i.e. acting on intelligence & CLV)

- *Turbines:* VoC Action Plans, Touch-points, Journey Maps, User Experience, Co-Innovation, Complaint Resolution, Service Excellence, Customer Care (i.e. conscience & outreach for customers' well-being)

### $B^2$ : BRANDING & INTERNAL BRANDING

$B^2$  Thrust: **Branding + Internal Branding**

(i.e. making + keeping promises)

- *Lift:* [ Internal Customer Satisfaction + Employee Engagement ]  
x [ Experiential Marketing, References, Community, Advocacy  
(i.e. word-of-mouth), CRM ]





# Putting Customers First: If Not You, Who?

In all my years of meeting about customer responsibilities, I have never once been in the same room both with those who actually lead the move to customer centricity *and with the people that prevent the move to customer centricity*. There are two reasons for this:

- First, organizations don't think much about how the business delivers customer experience (CX) and therefore how the leaders responsible for each function ought to be involved.
- Second, personal ownership for CX is devilishly difficult to define for non-customer facing functions, and not exactly a coveted designation.

Whatever way your company defines position power and influence, it is the first thing you need to figure out – and the answer is not necessarily a regurgitation of the org chart. Certainly, the CEO and his/her team must ultimately understand and agree with the customer centricity route, but I would be pleasantly surprised if every one of them starts out that way.

The reality is many a senior leader has agreed to put customers at the heart of the firm without understanding what that really means. Just because you're senior doesn't mean you are immune to humouring your boss or touting the party line. There is a treasure trove of influencers and activists in the layers below the big players that will be far more valuable to the cause, and the senior execs have every right to expect that kind of initiative from their people.

*Leaders require 4 capabilities to move their company to customer centricity:*

- (1) Understand the brutal facts
- (2) Admit the behaviours that produced the brutal facts
- (3) Evaluate the entire business through the lens of customer-centricity
- (4) Make customer-centricity a team sport

## 1. Understand the Brutal Facts

Brutal facts are only available from two sources: customers and the people who serve customers. Brutal facts are more than numbers – because without context, feedback, and actual behaviour, you're flying with a faulty dashboard. Reported activity is mighty seductive, but your current data probably includes market research and satisfaction surveys and performance metrics without much cross-tabulation.

Beware which numbers are not reported because they are not good, and which numbers actually matter to customers. Brutal facts include what customers actually say, not what we want to hear.

## 2. Admit the Behaviours that Produced the Brutal Facts

A former colleague complimented my role in getting our company to put customers first, saying previous efforts hadn't worked. I knew the concept was not new, and I knew people closest to customers knew what needed to change, so I asked him why the first 7 times failed. He said, "We had other priorities." I said "What were the other priorities?" He said: "You know, budget cuts, headcount constraints, competitive pressures, stuff like that."

I wanted to say, "Putting aside customers in favour of a budget challenge is like putting your kids in the basement for two years while you pay off your mortgage." But I didn't. I should have thanked him for illuminating a very common behaviour problem: companies that really don't grasp that ignoring customers (or your children) is not an option. You end up damaging the very reason you have a business (or a mortgage) in the first place. Enough said.

*(continued on the next page)*



### 3. Evaluate the Entire Business through the Lens of Customer Centricity

I would rather use another phrase as this one has been abused, but if we continue the family analogy, centricity would be organizing life around family. Putting customers first is the same kind of commitment, and half-measures don't work, if at all, certainly not forever. Spending the education fund on back taxes or an unaffordable house seems inconsistent with putting kids' long term well-being and obligations first. Cutting the operating costs of the places where customers connect with the business (think call centres), without investing in the technology, training and policies that help reduce calls, sounds like magical thinking to me.

By identifying what each function does in the business to support customer outcomes (and every function does have an impact on customers directly or indirectly – if you find any that don't, you've found unnecessary costs), taking a holistic approach to investments, processes and policies, and settling in for the long-term, you can run a business around customers. Rule One: Do. Not. Exempt. Anyone.

### 4. Make Customer Centricity a Team Sport

I suppose *team sport* is as good a definition of culture as there is, and far easier to understand than the academic ones. The younger me was highly skeptical of the merits of culture, and I blush to think how recently I have seen the light. Culture really does eat strategy for breakfast, and you can successfully change what is on the menu.

There are several nuances to this, of course, but leaders have to understand the business well enough (major processes broadly, and their function deeply) to protect customers from myopic decisions that have unintended consequences. Budgets, egos and protectionist behaviours are the enemies of team sport. That is why intact teams play better together than all-star teams, despite the best talent money can buy and world-class expertise, and support on the sidelines.

Same goes for **customer centricity**, the definition of which goes like this: everyone needs to figure the exact way in which their work affects customers, and in doing so, which functions, departments, teams and colleagues they are in service to, and vice versa. It's six degrees of separation without Kevin Bacon (unless you work with him).

### The Bottom Line

Here is what's true in my 31 years in business: there is no organizational, title, or position solution to putting customers first; there is only ensuring everyone accepts personal responsibility for customer centricity. Not general responsibility (too flaky), rather, specific responsibility, without which, all you have is diffused responsibility. Diffused responsibility is far worse than no responsibility, and probably worse than whatever you have now.

Once your company accepts this truth, gears up for big bang, and begins to address the challenges in every area of the business (no exceptions), making sure all HR policies support the approach, true customer centric culture will be in your grasp.

If not you, who?

by Carol Borghesi, ClearAction Customer Experience Optimization Strategist



# Customer-Centricity is More Than Customer Experience Management

Customer experience management (CEM) is necessary, yet insufficient. Traditionally, organizations have managed customer experience (CX) with a mindset of how the company is doing, in order to grow revenue. Consequently, surveys tend to ask more about the company than about the buyer, and customer programs typically emphasize excitement and urgency for new purchases and positive word-of-mouth. While attempting to be customer-centric, this mindset is generally centered more on the company's, rather than the buyer's, well-being.

Alternatively, customer experience optimization (CXO) seeks to align company-wide thinking and actions with buyer preferences across the entire customer experience spectrum, in order to grow both revenue and profit naturally.

This somewhat subtle difference can cause a magnitude of difference in the actual CX, as well as employee experience and business results. Why? Because growing revenue and profit *naturally* — without constant investment in generating hype — requires abandoning pet-projects and self-serving attitudes, as well as both small and large actions that aren't in alignment with what matters to buyers. (Note: a buyer is anyone who weighs in on the purchase decision and/or uses what will be or was purchased.)

## Knowing Who's Boss

Think about human nature when a new boss comes on board — most employees, even at the executive level, will try to learn all they can about how to get ahead with the boss, because he/she has power to grant assignments, judge performance, recommend promotion, and determine financial outcomes for the employee. It's common sense to seek alignment with whoever holds the purse strings. But, in reality, who holds the ultimate purse strings? No, not investors — they leave when customers leave.

It's buyers who have ultimate power to judge performance and determine financial outcomes for the company, and consequently, for each department and employee. So shouldn't it be common sense to seek alignment with buyers?

The definition of "centric" is: situated in or at the center; central, pivotal, focal, radially symmetrical. Customer-centricity is rooted in motives, and enabled by culture (e.g. an organization's ways of thinking and doing), structure, and information.

At the employee level, to be customer-centric means your first priority is to strive to make it easier and nicer for customers to get and use solutions they're seeking. And everything else in your job is secondary to that. If your job doesn't interface with buyers, then your first priority is to make it easier and nicer for your internal customers to get and use solutions they're seeking, within the context of what external customers need to easily and nicely get and use solutions they seek.

At the corporate level, to be customer-centric means your first priority is to have the right product/service work the right way the first time and every time, supported by the right processes, policies, attitudes and decisions — as your recipe for success in maximizing revenue, minimizing costs, and mutually pleasing employees, customers, shareholders, and other stakeholders.

Here's a 3-step recipe for CXO:

- 1) Take the customer perspective
- 2) Customer-focused decisions as a way of life
- 3) Engage cross-organizationally for CX excellence

(continued on the next page)



## 1) Take the Customer Perspective

The first step in shifting to customer experience optimization (CXO) mode is to inspire employees to take the customer perspective, seeking to know your customers' world better than your competitors do.

This mindset constantly explores what the customer is doing and why, and how the company can contribute to buyers' well-being, as the means toward both revenue and profit growth naturally. To see things the way customers do, you have to make as much effort to thoroughly understand their frustrations as you do to learn their delight factors. Until you can see the customers' world as they do, you'll be speaking a foreign language to them, to some degree, in what you deliver as the CX.

## 2) Customer-Focused Decisions as a Way of Life

The second step in shifting to CXO mode is to instill customer-focused decision-making as a habit among all employees, and as a way of life.

This mindset does not stop at front-line employees' impact on buyers — everyone company-wide is expected to understand the snowball effect of their role on CX. Customers don't care about departments — they see a brand as one entity. Hence, customer-focused decision-making requires relentless silo-busting and stakeholder management, and employee engagement within the context of CX requirements.

## 3) Engage Cross-organizationally for Customer Experience Excellence

The third step in shifting to CXO mode is to engage employees to resolve and prevent issues for customers, by collaborating cross-organizationally for CX excellence.

This mindset does not stop at resolving issues at customer touch-points. Systemic resolution of problems and prevention of issues for customers is the best way to minimize costs and maximize morale for employees and customers alike.

Customer-aligned actions go beyond technology and revenue tools to transform the company in accordance with what matters most to buyers. Policies and strategies, as well as processes and tactics — and pre- and post-purchase experiences, as well as the product/service per se — are constantly explored for ways to sustainably differentiate CX.

## True Characteristics of Customer Experience

Let's not throw the baby out with the bathwater: CEM, as it has traditionally been practiced, is certainly an excellent step forward for any organization. Yet, with the enduring chasm between companies' and buyers' views of what customer-centricity really is, every organization still has a continuing journey in taking their game to the next level of accuracy and effectiveness.

Each of us is a customer ourselves. So theoretically, we should each be an expert in seeing the customer perspective, making customer-focused decisions, and acting cross-organizationally for consistent CX excellence. Somehow there's a disconnect in our thinking as a customer and our thinking toward customers. It's ironic. Quite simply, it's all about remembering who's boss.

Traditional management practices have confused us about who's boss. Revenue or 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.

Let's re-educate ourselves about the true characteristics of customer experience as we all know them: customers see through a solution provider's motives, and reward genuine sincerity for the customer's well-being.

*by Lynn Hunsaker, ClearAction Customer Experience Optimization Strategist*





# Customer Experience Management is Like Herding Cats

The role of Customer Experience Influencer is more realistic than the so-called Customer Experience Manager role. If you try to *manage* (i.e. control) the customer experience, you just might as well change jobs and become a cat herder. You will have many more successes to celebrate as a cat herder than you will as someone who attempts to manage (control) the customer experience. Why? It's mainly because people do not want to be controlled. You have to influence their experience, not manage it. Try to control them and you'll get the claw.

A great example of influence versus control is illustrated in a Super Bowl advertisement that aired in the year 2000 for Electronic Data Systems (EDS), now part of HP. The "Cat Herders" commercial visually documents the extraordinary courage, effort, and gratification of being a Cat (not cattle) Herder. You can easily see what it was like to live the dream of driving those short hairs into town while not losing a single one – ain't a feeling like it in the world. Don't let anybody tell you that it's easy.



The commercial attempts to convey a message in a funny (belly-laughing) way. The message is that EDS can help to make the complexities of your business easier and will help to move you in the right direction. I am not certain if the message is as memorable as the thought of trying to herd cats. Trying to herd cats is so ridiculous that when we are in a situation where very little is going the way we want, we say that "I am trying to herd cats" If someone says this to you, you know exactly what they mean and can usually feel their pain. They are in a crazy situation that is difficult to control. You can't control cats which is why dog people naturally hate cats. Cats do what they want. You have to influence a cat's behavior, not control it. Try to make a cat obey and you get the claw.

The evidence is very clear: managers seek to control and *leaders seek to influence*. To create an exceptional customer experience, you must think like a Customer Experience Influencer, not Manager.

In their book, *Outside In*, authors Harley Manning and Kerry Bodine define customer experience as how your customers perceive their interactions with your company. The key word in this definition is: perceive! In order to have others perceive something, you must influence them according to their perceptions of what they want.

## What You Should Manage

What you can control, and therefore what you need to manage, are the tactics and tools that will assist you with influencing customers' perceptions of your company. With this mindset you can then review three things that you may have analyzed before, but now use a very different lens than you have used in the past. This time review beyond the functional and delve into the finesse aspects of serving customers to drive positive perceptions of your customer interactions. Apply your new perspective when you review:

*Product.* Instead of thinking about what it is or what it does, it's time to infuse how it makes them feel. Even if you sell software, your software may relieve the stressful feeling of trying to get work done in a limited amount of time. It may make them feel confident in doing the job right.

*Process.* Instead of thinking in the context of steps, think about ease and agility. Giving customers the picture that you are easy to do business with is rapidly becoming a competitive difference and advantage for the influential few.

*(continued on the next page)*



*People:* Instead of think about transactions think about interactions. Interactions are when you and your customers have an effect upon one another or when you have an effect on your agents. The concept of effect is essential when you are trying to influence. Managers think with the mindset of transactions, not interactions.

### So What!?

You might be saying this is all semantics; that these are just words and that this mindset is included in the way organizations develop their products, processes, and people strategies. If this were true, why did Watermark Investment Consulting report the following:

“Over a 6-year period, customer experience leaders outperformed the S&P 500 index by 28%. Those who had poor customer experience performance lagged behind the index by almost 20%.”

With this differentiated performance, these customer experience leaders must be doing something . . . well . . . DIFFERENT!

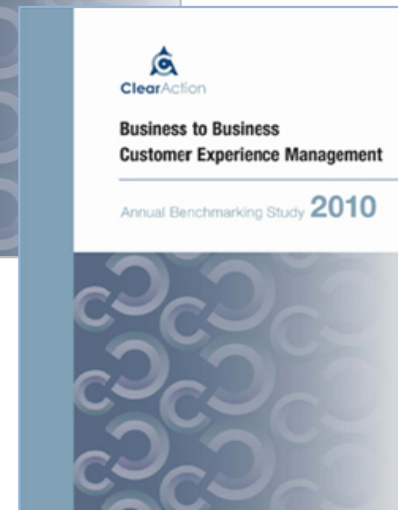
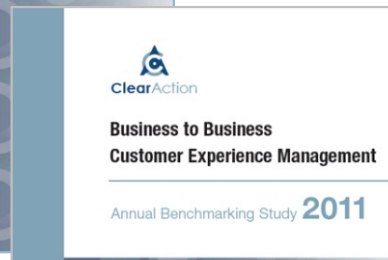
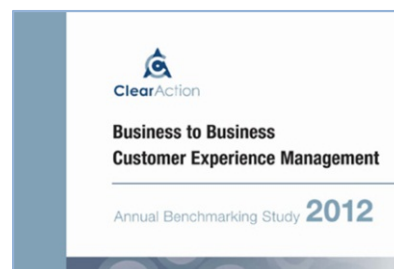
So here is your chance to decide. You can either lead or manage. If you want to influence your destiny, there is no better time than ever before to make the shift from thinking transactions to thinking interactions. Think influencing the customer experience, and not managing the customer experience. When you learn how to influence the customer experience you will bring that herd into town. When that happens, ain't a feeling like it in the world. But, don't let anybody tell you that it's easy.



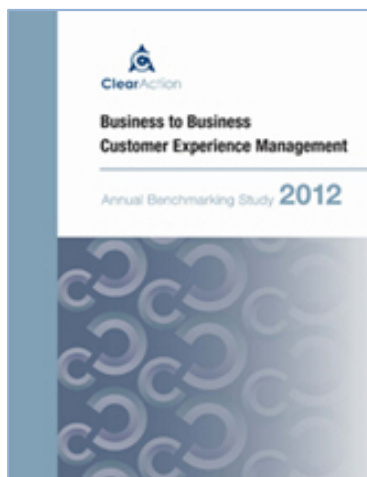
*by Jim Rembach, ClearAction Customer Experience Optimization Strategist*

## Request a Presentation of the B2B CEM Study Findings & Recommendations

OptimizeCX@ClearAction.biz



# 2012 B2B CEM Study: Overview



## Study Theme:

Shows 3-year trend data and features stories of B2B CEM successes, featuring companies such as Ciena, Citrix, LexisNexis, Maersk Line, Orange, SunTrust, Symantec, tw telecom, and others in business services, building materials, remarketing, and semiconductor industries.

## Study Launch Press Release:

[prweb.com/releases/customer/experience/prweb8412325](http://prweb.com/releases/customer/experience/prweb8412325)

## Study Report Press Release:

[prweb.com/releases/customer/experience/prweb9053422](http://prweb.com/releases/customer/experience/prweb9053422)

## Participants' Job Roles:

Senior VP of Client Experience and Loyalty, VP of Customer Experience, VP of Member Experience, VP of Customer Satisfaction and Quality, Chief Marketing Officer, Customer Experience Officer, Head of Customer Experience, Head of Customer Service, Global Customer Experience Director, Customer Experience and Insights Director, Customer Advocacy Director, eBusiness Strategy & Customer Experience Director, Enterprise Customer Fulfillment Global Director, Global Customer Experience Manager, Customer Experience Manager, Customer Experience Program Manager, Business Intelligence Manager, Commercial Accounts and Development Manager, Market Research Senior Manager, and Senior Customer Satisfaction Analyst.

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### 1) Motivation for CEM

- Top 3 Motivations for B2B CEM
- Role of CEM in Corporate Strategy and Day-to-Day Business
- Current Emphasis of B2B CEM
- Investment in Customer Knowledge, Well-Being, Profitability
- Deployment Company-wide or in Some Business Units
- Coordination Among Managers of B2B CEM Methods
- Greatest Obstacles to B2B CEM Success

### 2) Journey to World-Class in How We Listen to Customers

- Our Practice of Customer Voice Activities
- Journey to Voice-of-the-Customer Maturity

### 3) Journey to World-Class in How We View Customers

- Our Practice of Customer View Activities

### 4) Journey to World-Class in How We Center Our Employees on Customers

- Our Practice of Employee Customer-Centricity Activities
- Employee-Related Tools for B2B CEM

### 5) Journey to World-Class in How We Center Our Business on Customers

- Our Practice of Organizational Customer-Centricity Activities
- Organization-Related Tools for B2B CEM
- Technologies in Use for B2B CEM

### 7) Methodology

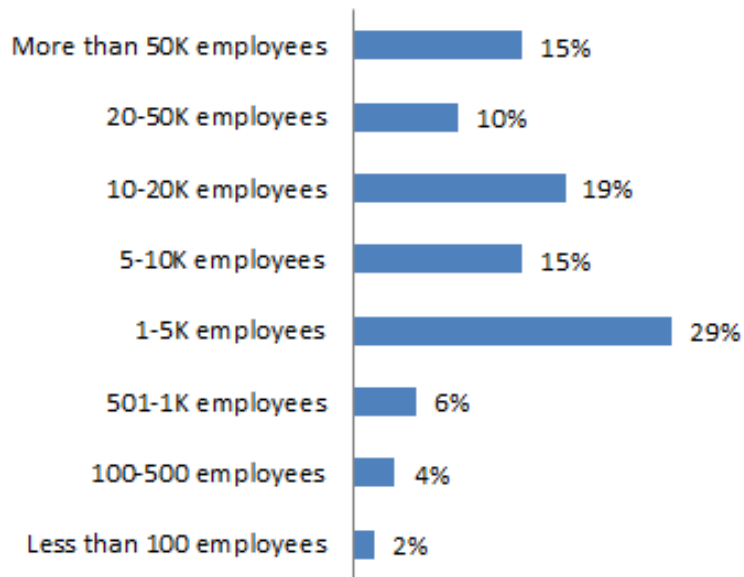
### 8) Related Articles

- 10 Characteristics of Customer Experience Management
- 8 Paths to Value Through Benchmarking Studies

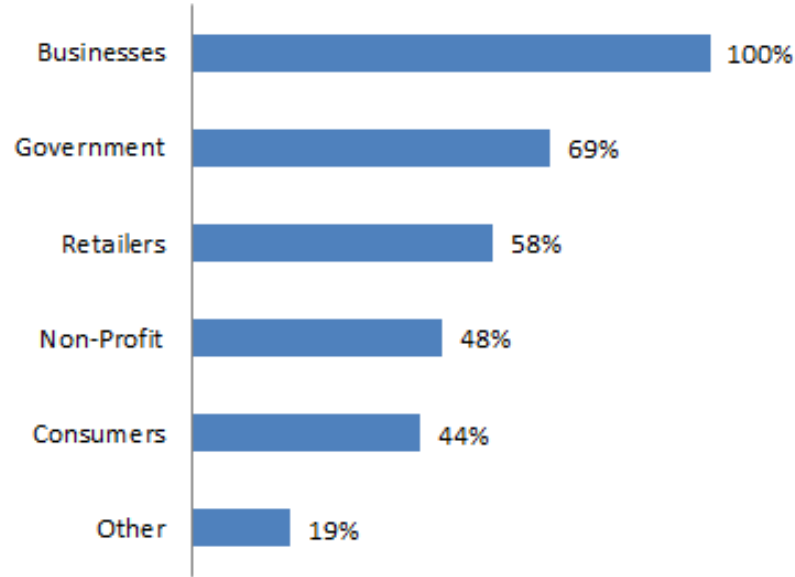


# Profile of 2012 B2B CEM Study Participants

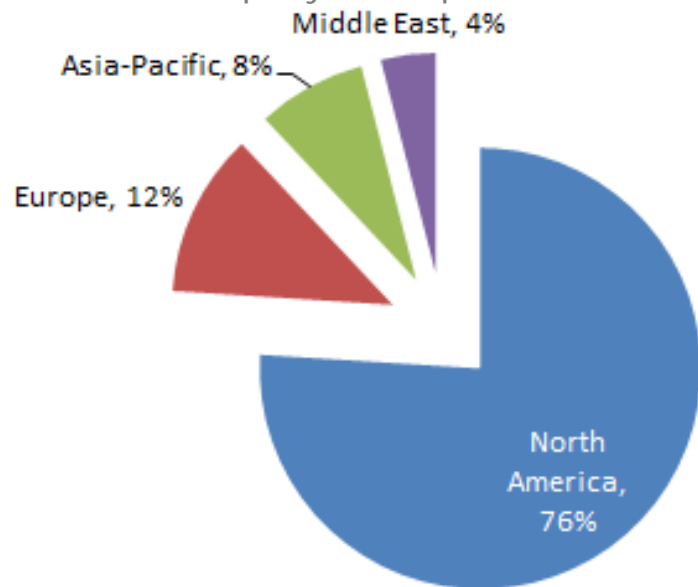
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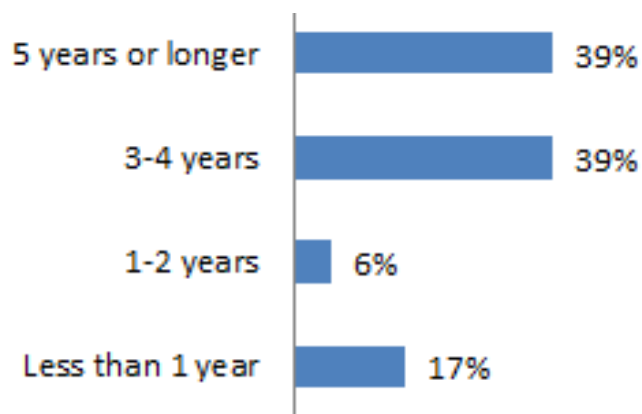
## Markets Served by Company



## Company Headquarters



## Tenure in CEM Role





# 2011 B2B CEM Study: Overview



## Study Theme:

Identified 7 success factors linking CEM to corporate goals, customer-centric culture, and stronger business results.

## Study Launch Press Release:

[prweb.com/releases/customer/experience/prweb8412325](http://prweb.com/releases/customer/experience/prweb8412325)

## Study Report Press Release:

[prweb.com/releases/customer/experience/prweb9053422](http://prweb.com/releases/customer/experience/prweb9053422)

## Participants' Job Titles:

Vice President of Customer Experience, Vice President of Customer Operations, Vice President of Customer Care & Support, Customer Engagement Champion, Director of Client Experience & Loyalty Development, Director of Customer Care, Director of Client Experience & Voice of the Customer, Director of Strategic Accounts, Director of Sales, CRM Department Leader, Manager of Business Excellence Deployment, Customer Experience Program Management, Project Manager, and Group Manager.

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- Role of CEM in Day-to-Day Business
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### 3) Journey to World-Class in How We View Customers

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- Methods for Making Survey Data Available

### 4) Journey to World-Class in How We Center Our Employees on Customers

- Our Practice of Employee Customer-Centricity Activities
- Employee-Related Tools for CEM
- Funding Employee Engagement in CEM

### 5) Journey to World-Class in How We Center Our Business on Customers

- Our Practice of Organizational Customer-Centricity Activities
- Organization-Related Tools for CEM
- Funding Customer Engagement in CEM

### 6) Functional Areas Driving CEM

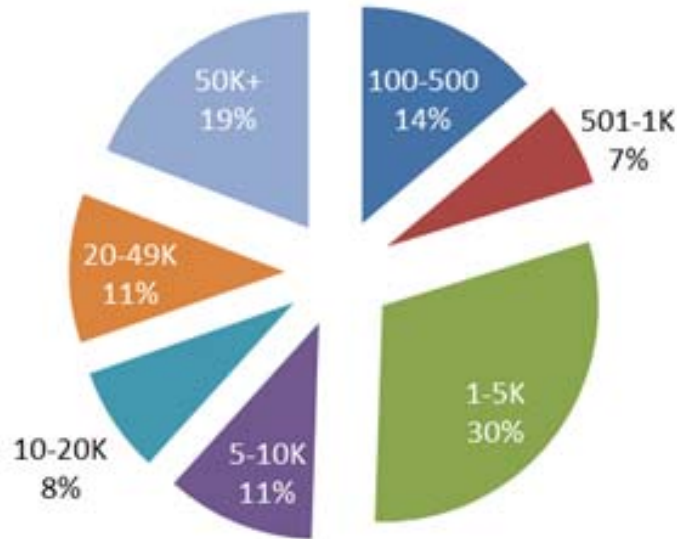
- Customer Well-Being
  - Customer Knowledge
  - Customer Profitability
- Bonus Article:* Customer Care ... CRM ...  
Customer Experience: What's the Difference?

### 7) Methodology

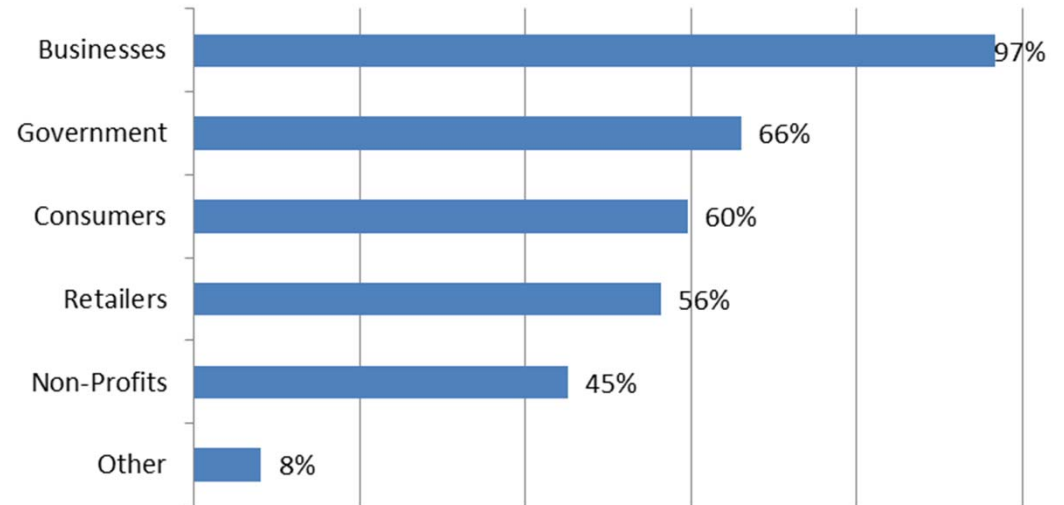


# Profile of 2011 B2B CEM Study Participants

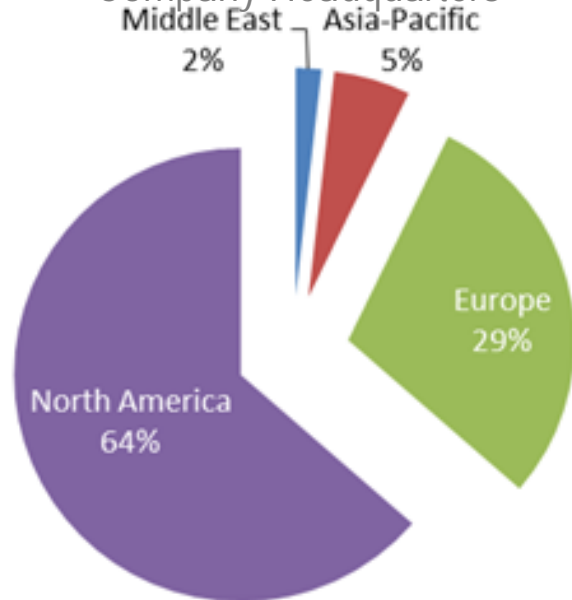
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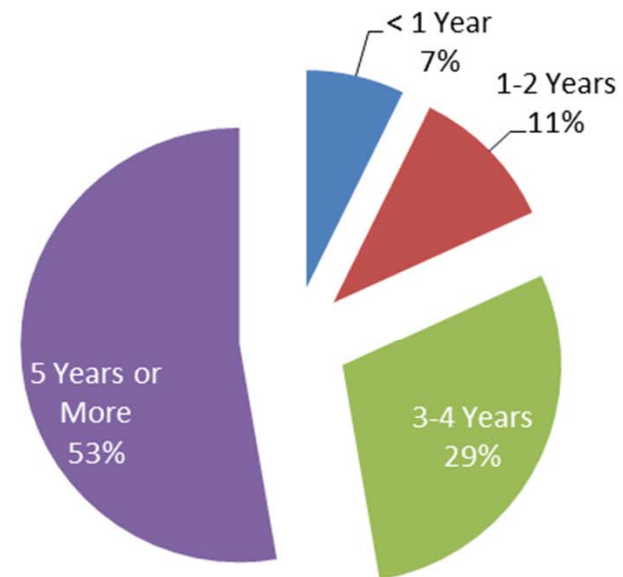
## Markets Served by Company



## Company Headquarters



## Tenure in CEM Role



# 2010 B2B CEM Study: Overview



## Study Theme:

Examined the functional owners of various CEM programs, and the scope of organizational deployment

## Study Launch Press Release:

[prweb.com/releases/customer/experience/prweb4650034](http://prweb.com/releases/customer/experience/prweb4650034)

## Study Report Press Release:

[prweb.com/releases/2011/1/prweb4946354](http://prweb.com/releases/2011/1/prweb4946354)

## Participants' Job Roles:

Voice of the customer, market research, data-mining, customer intelligence, customer relationship management, customer references, experiential marketing, loyalty, customer lifetime value, customer community, word-of-mouth, co-innovation, branding, internal customer satisfaction, service excellence, call center, user experience, and complaint management.

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- Customer View
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### 6) Functional Areas Driving CEM

- Customer Well-Being
- Customer Knowledge
- Customer Profitability

### 7) Methodology

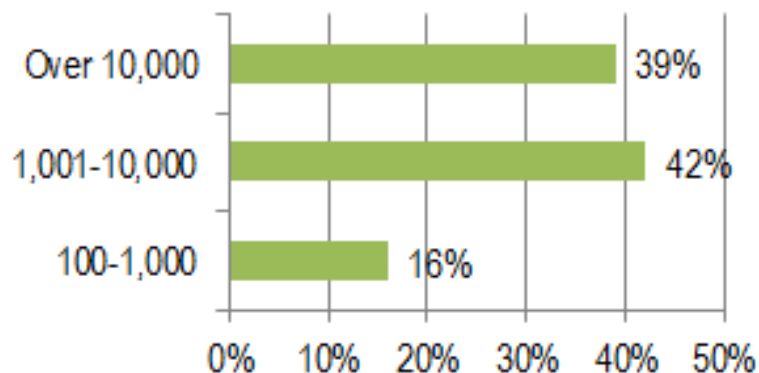
### 8) Appendix

- Comparison of B2B and B2C Studies
- B2B Myths Debunked
- How Do You Learn Best Practices? (Question Asked on LinkedIn and Focus.com)
- 4 Related Articles Regarding 10 Characteristics of Customer Experience Management

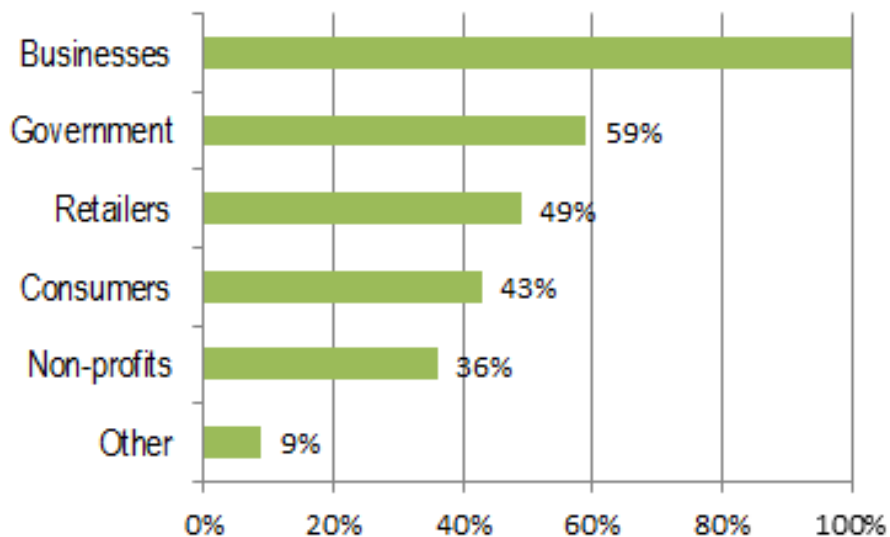


# Profile of 2010 B2B CEM Study Participants

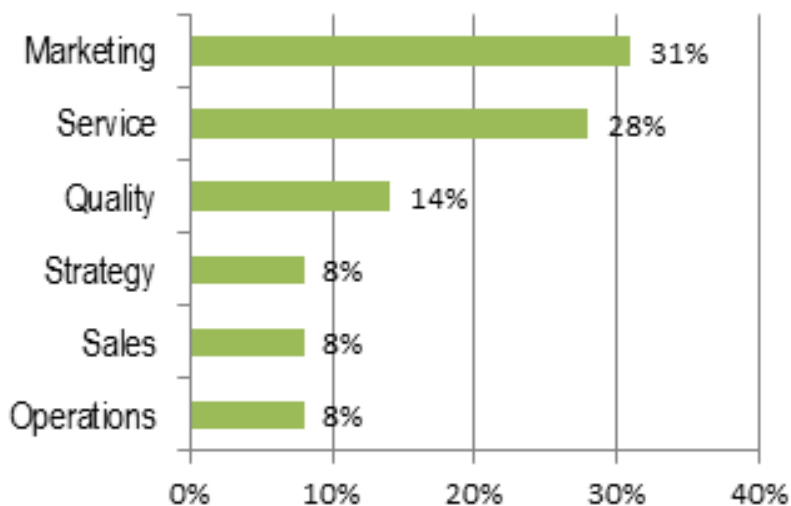
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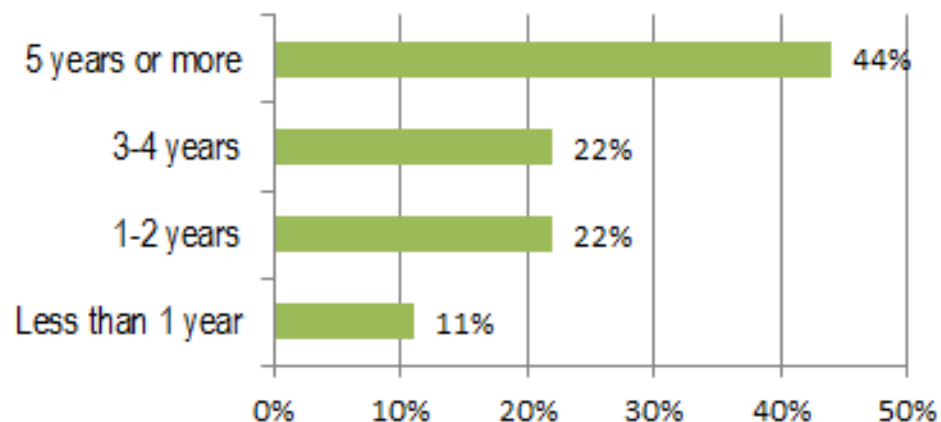
## Markets Served by Company



## Participants' Career Path



## Tenure in CEM Role



# Participating Companies in the ClearAction B2B CEM Survey, 2010-2013

- |  |  |   |  |
|--|--|---|--|
| <ul style="list-style-type: none"> <li>• Abbott Medical Optics</li> <li>• Acer Computer</li> <li>• ACL Services</li> <li>• Adobe</li> <li>• Advanced Integration Technologies</li> <li>• Allianz</li> <li>• Allstream</li> <li>• Americold</li> <li>• ANX</li> <li>• Aon</li> <li>• Atlassian</li> <li>• Audatex</li> <li>• Autodesk</li> <li>• Aviva</li> <li>• Bank Muscat</li> <li>• Bosch</li> <li>• Canada Post</li> <li>• Carey</li> <li>• Cell C</li> <li>• Cemex</li> <li>• CHEP</li> <li>• Ciena</li> <li>• Citirx</li> <li>• Colliers International</li> <li>• Colt Technology</li> <li>• Copart</li> <li>• CPI Card Group</li> <li>• Crowe Horwath</li> </ul> | <ul style="list-style-type: none"> <li>• DirectEnergy</li> <li>• Domino Printers</li> <li>• EMC</li> <li>• Enogex</li> <li>• Equinix</li> <li>• Etsilat</li> <li>• Experian</li> <li>• Fifth Third Bank</li> <li>• First Caribbean International Bank</li> <li>• Fuji Xerox</li> <li>• General Electric</li> <li>• Genpact</li> <li>• Global Crossing</li> <li>• Global Knowledge</li> <li>• Gorkana</li> <li>• Grameenphone</li> <li>• HealthNow</li> <li>• HCL</li> <li>• Hewlett-Packard</li> <li>• Hong Kong CSL Limited</li> <li>• Huntington Bank</li> <li>• Hydro-Quebec</li> <li>• Infosys Lodestone</li> <li>• Ingersoll Rand</li> <li>• ISS Worldwide</li> </ul> | <ul style="list-style-type: none"> <li>• John Deere</li> <li>• Kennametal</li> <li>• Lawson Products</li> <li>• LexisNexis</li> <li>• Lexmark</li> <li>• Level 3 Communications</li> <li>• Lifetech</li> <li>• Lumension Security</li> <li>• Maersk</li> <li>• Mapfra Asistencia</li> <li>• Matheson Fast Freight</li> <li>• Merck</li> <li>• Miller-Heiman</li> <li>• Mine Safety Appliances</li> <li>• Minitab</li> <li>• Mutual of Omaha</li> <li>• Navis</li> <li>• NCR</li> <li>• Neustar</li> <li>• NII Holdings</li> <li>• Nobel Biocare</li> <li>• Omnitel</li> <li>• Orange</li> <li>• Perkin Elmer</li> <li>• Pershing</li> <li>• Pitney Bowes</li> <li>• Qliktech</li> <li>• Rentokil Initial</li> </ul> | <ul style="list-style-type: none"> <li>• Sage</li> <li>• Sandisk</li> <li>• Sanitop</li> <li>• SAVO Group</li> <li>• Schneider Electric</li> <li>• Siemens</li> <li>• Simplex Grinnell</li> <li>• Spigit</li> <li>• SunGard</li> <li>• SunPower</li> <li>• SunTrust</li> <li>• Surgical Information Systems</li> <li>• Symantec</li> <li>• Symmetricom</li> <li>• Tango/04</li> <li>• Thermo Fisher</li> <li>• Thomson Reuters</li> <li>• TNT Express</li> <li>• Turassist</li> <li>• UPS</li> <li>• US Bank</li> <li>• Verisign</li> <li>• Walker</li> <li>• Walsworth</li> <li>• Welch Allyn</li> <li>• Xerox</li> </ul> |
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Notes: Many additional companies chose to remain anonymous. Some of the above participants opted to keep their company and industry information separate from their responses. Confidentiality of all responses is assured by ClearAction.

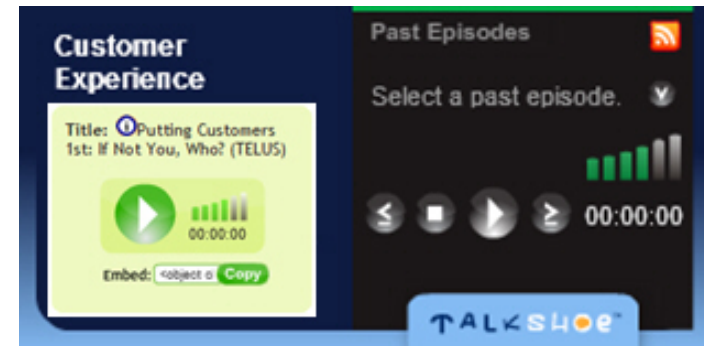




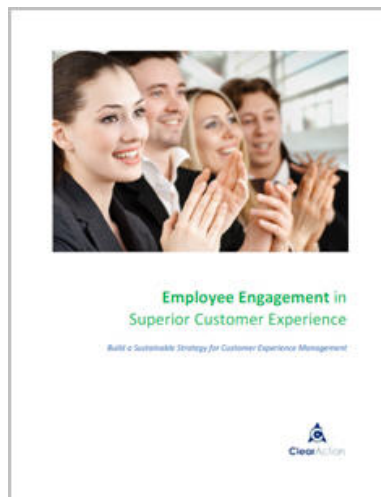
# Resources for Learning More About CEM Best Practices



e-books available at  
[www.ClearAction.biz/innovation](http://www.ClearAction.biz/innovation) or Amazon Kindle:  
**Metrics You Can Manage For Success**  
**Customer Experience Improvement Momentum**  
**Innovating Superior Customer Experience**



**Customer Experience Optimization Talk Show**  
 Hear interviews with companies such as:  
 Adobe, Aon, CenturyLink, Cisco, Citrix, Coca Cola  
 Enterprises, Dell, EMC, GE, HP, ICW, Intuit, Kimpton, NCR,  
 Philips, Safelite, Sungard, SunTrust, Symantec, TELUS, tw  
 telecom, Virgin Mobile, Wells Fargo  
<http://ClearAction.biz/podcasts>



white paper available at [www.ClearAction.biz/strategy](http://www.ClearAction.biz/strategy)  
**Employee Engagement in Superior Customer Experience:**  
 4 Overlooked Key Competencies for Sustainable Results

See more at <http://ClearAction.biz/best-practices>





ClearAction is a customer experience management consulting firm that helps organizations build enterprise-wide customer-focus and customer experience differentiation.

Everyone on the ClearAction team has been responsible for employee engagement in customer experience improvement as employees at Applied Materials, AutoZone, Bharti Airtel, British Telecom, Deluxe Financial Services, Earthlink, General Electric, IAC/Equinix, Merck, Sonoco, Teknekron, TELUS.

At these companies our roles have included SVP-Client Experience, SVP-Customers First Culture, VP-Customer Retention, VP-Business Intelligence, AVP-Business Development, Chief Customer Officer, Head of Corporate Quality, Director of Customer Service, Customer Insights Leader, Director of Marketing, Customer Satisfaction Improvement Manager, Voice of the Customer Manager, Strategic Information Manager.

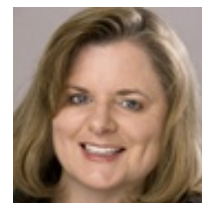
Our team includes:

- Jim Rembach in Charlotte
- Kay Jackson in Philadelphia
- Roberta O'Keith in Kansas City
- Lacey Grey in Des Moines
- Carol Borghesi in Vancouver
- Lynn Hunsaker in San Jose

We welcome an opportunity to get acquainted with you!

Send us a note: [OptimizeCX@ClearAction.biz](mailto:OptimizeCX@ClearAction.biz)

## ClearAction Seasoned Practitioners of Customer Experience Optimization



Lynn  
Hunsaker



Carol  
Borghesi



Jim  
Rembach



Kay  
Jackson



Lacey  
Grey



Roberta  
O'Keith

*We guide company-wide action  
on a clear view of customer intelligence.*

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



# ClearAction Understands Unique B2B CEM Challenges

Let's talk about developing a CEM strategy that helps you clearly see what's needed for company-wide action in universal and B2B CEM challenges.

The ClearAction team has first-hand experience engaging employees to drive significant change for B2B customers.

## B2B Voice of Customer from all decision influencers:



*Are all decision influencers heard?  
Are all inputs equitably integrated?*

How to hear all  
influencers

*Don't settle for  
half of the picture  
of re-buy decision-making.*

## B2B VoC Action on input from all influencers:



*Do you cater to all stakeholders?  
Is there a closed-loop for all?*

How to use all  
influencers' inputs

*All influencers' needs  
must be managed to maximize  
recommendations & repurchases.*

## B2B Customer Journey with complex interfaces:

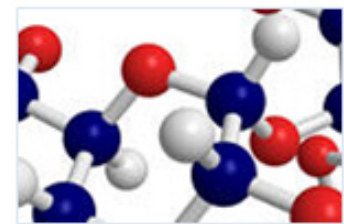


*Is informal contact coordinated?  
Is continuity of CX monitored?*

How to empower  
consistency

*Customers' trust of your company  
increases with predictability  
across the customer journey.*

## B2B Postpurchase Touchpoints for consistent CX excellence:



*Do you collect informal VoC?  
Is re-buy intention proactively managed?*

How to manage  
re-buy intention

*Inter-organization contacts  
offer opportunities  
for proactive relationship growth.*

Send us a note: [OptimizeCX@ClearAction.biz](mailto:OptimizeCX@ClearAction.biz)



Get Your Copy of the B2B CEM Best Practices Study

[www.ClearAction.biz/benchmarking](http://www.ClearAction.biz/benchmarking)



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