

Customer First

1. Why happy customers matter

When we use the word customer, we really mean anyone who your organisation serves. They may be other businesses, consumers who purchase from you, diners in your restaurant, patients in your clinic, visitors to your attraction or event. They are all customers

That customer should be at the heart of your organisation, after all they are the reason you are there and without them you would not exist. This quite attributed to Ghandi in his early years, sums it up –

“A customer is the most important visitor on our premises. He is not dependent on us, we are dependent on him. He is not an interruption of our work, he is the purpose of it. We are not doing him a favour by serving him; he is doing us a favour by allowing us to do so”



It's not rocket-science to work out why happy customers matter. If customers are satisfied, or rather delighted with the services you provide they are more likely to come back to you and more likely to recommend you to others. That reduces the cost of remedial action to make unhappy customers happier and reduces the cost of churn.



There are many different figures quoted and it clearly varies across sectors and customer types, but the fact remains it costs a lot more to attract a new customer, than it does to retain a current one



If a customer is unhappy with the way they are treated they are more likely to leave a brand. Often that decision is driven by the way interaction with staff over the product itself.

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One bad experience can take a long time and a lot of good experiences to recover from. For an improving organisation that's a challenge as reputation often lags behind reality and a business that was poor in the past needs to be right for some time before customers accept it is a genuine change



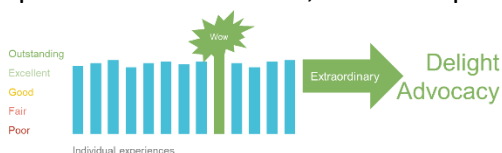
Great customer experiences come in many different guises:

Consistently good service levels mean customers know what to expect and are confident that the service delivery will meet those expectations. A restaurant

that is immaculately clean, serves consistently good food, whose staff are always polite, friendly and efficient and charges a very fair price will provide an experience that customers trust and will likely lead to recommendation to others.



But it can also be the unexpected moments of delight, that can turn an emotionally unengaging transaction into something special. Buying printer ink is, at best a routine purchase and at worst, a distress purchase, choice of retailer driven by cheap prices and

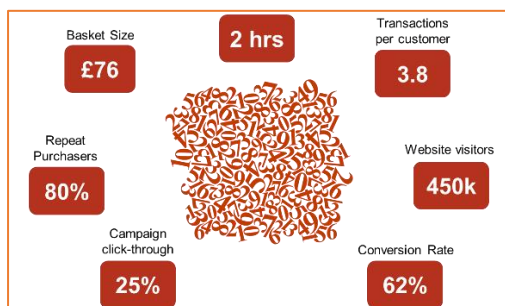


hassle-free order and delivery. I ordered the wrong ink – entirely my fault. When I got in touch to sort out a refund and re-order they were incredibly helpful, making sure I had the right ones and

arranging free of charge express next day delivery. The speed of refund on the returns was impressive too. They behaved as if it were their fault not mine and provided a level of service you would expect from a premium supplier not a price-driven online retailer. I'm now their no.1 fan!

Clearly, it's not always possible to keep every customer happy all of the time, though that shouldn't stop organisations striving for that goal. But it is important to realise the impact that unhappy customers can have on your business.

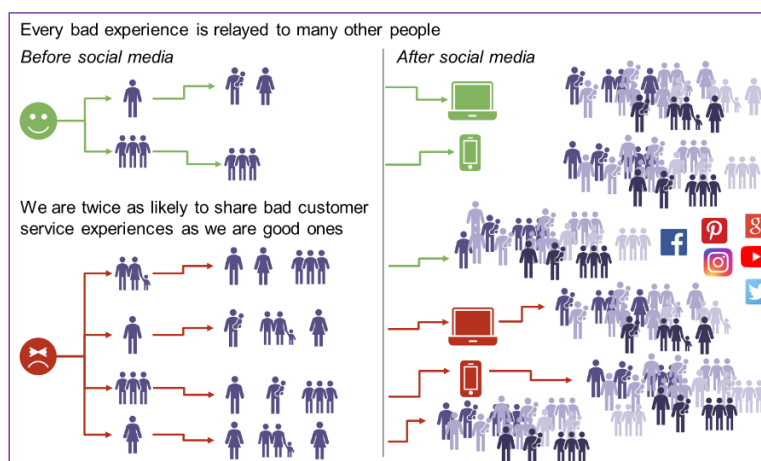
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It would be wrong to assume you know what your customers think without actually asking them. Clearly business metrics such as customer loyalty, basket size, repeat visits, churn rates and so on are important indicators, they tell you how you are performing in the here and now, but you invariably need to know more from your customers in order to improve many of those metrics.

In the past, any individual good or bad experience was shared with a small group of associates. We might ask a colleague or friend for a recommendation, but now it is far more public and social media acts as a multiplier

Review sites are increasingly shaping how we transact. Before we book a holiday we seek out reviews of accommodation providers, travel companies and destinations. Before we buy the latest tech product we read reviews, trying to sift out the paid-for advertorial reviews and awards as we search for the opinions of 'people like us'. We even check out patient reviews of doctors and healthcare providers, so we can form an expectation before the appointment.

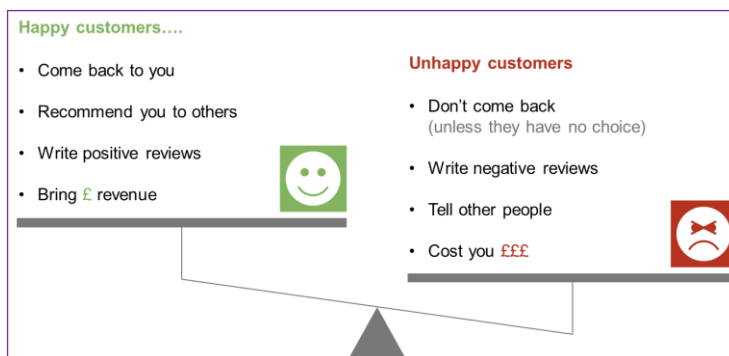


The review culture is making the need to deliver great customer service even more business-critical. It is also impacting the need to make sure that remedial action is swift and effective when things have gone wrong. If you needed any more convincing of this point then look no further than eBay, a business built almost entirely out of the power of reviews. We happily transact with unknown sellers online, based purely on their eBay rating. If it's anything less than 99.9% we think twice before buying. So don't ever slip into thinking that the odd negative feedback doesn't matter!

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Review sites can tell you what a minority of customers think, either highlighting strengths to maintain or issues that need to be tackled on an individual customer basis. Reviews often give immediate feedback that can be hugely valuable, but they will only ever be part of the story rarely allowing you to identify the scale of an issue or establish whether they represent the majority view.

So, in summary we can see just how important contented satisfied customers are to every organisation. The more delighted those customers are the more the scales swing in your organisation's favour.



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2. What your customers think

It is worth taking stock of how much you know about your customers and what they think of you. How do you gather feedback from them? Do you really know whether they are satisfied? Do you know what delights them? Do you know what causes them distress?



And, if you do know the answers to those questions, Are your customer needs driving your strategy? And on a more tactical level are your customer-facing staff empowered to keep customers happy?

If you would answer 'no' or even 'I'm not sure' to any of those questions then you likely need to get more feedback from your customers.

So, you've decided you want to get feedback from your customers, what are the rules you should put in place to do this effectively? There are a number of key points that we think are important to tackle:

1. Try to reach a representative sample of your customers, or even better give all your customers an opportunity to give feedback.
2. Think about those people who didn't actually transact, but who are still your customers, people who browsed your website, came into your store, looked at your trade stand, came with a patient as supporter or carer. These people are important too, their experiences matter but they are often harder to reach
3. Think about all the touchpoints your customers have with you. It's not just about the store experience or the event or the appointment. The touchpoints that led up to that are vital; was your website easy to use? how was the booking process? could they find what they wanted? Was the call centre helpful? And it doesn't stop at the transaction – was the after-sales support good? Were follow-up actions taken? Did the product or service perform as it should? You can't necessarily ask everyone about every touchpoint but collectively they make up the overall perception of your organisation

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4. Strive for 'in moment' or 'real time' feedback. Asking someone how their experience was 3 months after a routine transaction will give you little detail and might not even be accurately recalled. If they had a bad experience, contacting them long after the event will do little to improve their view of you and in the meantime they may well have written negative reviews and told friends and colleagues about their (poor) experience. If you ask for feedback close to the point of experience, it will be accurate and detailed. It will be relevant to the customer and will be actionable for you.



Online surveys are often the best approach, offering flexibility and value and we'll talk about them in more detail later, but it's worth spending a few minutes looking at the alternatives

	Face-to-face Interview	<ul style="list-style-type: none"> ✓ All visitors ✓ Detailed information 	<ul style="list-style-type: none"> ✗ Expensive ✗ Over-engineered
	Telephone Interview	<ul style="list-style-type: none"> ✓ Detailed information 	<ul style="list-style-type: none"> ✗ Need contact details ✗ Quite expensive
	Pen & Paper Survey	<ul style="list-style-type: none"> ✓ Cost-effective ✓ Accessible to all 	<ul style="list-style-type: none"> ✗ "old-fashioned" ✗ Slow to process
	DIY Research	<ul style="list-style-type: none"> ✓ Cheap ✓ Quick 	<ul style="list-style-type: none"> ✗ Over-simplified ✗ Lack of analytics
	Qualitative	<ul style="list-style-type: none"> ✓ Depth & Detail ✓ Diagnostic 	<ul style="list-style-type: none"> ✗ Expensive ✗ Not Quantified

In the past market research was typically done using interviewers who asked questions face-to-face. There are still times when this is appropriate, particularly if you are looking for detailed feedback from a hard-to-reach group. However, it's expensive and is rarely the best solution for customer experience feedback.

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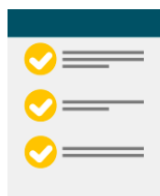
The same goes for telephone interviews. People are busy and increasingly hostile towards unsolicited phone calls. Again, in some scenarios it's still a method to consider, when you need detail or want to show important customers you care for example in a business-to-business environment where you are reliant on a small number of very big customers.

Pen and paper surveys were for many years the mainstay of customer experience research, whether handed out in the store or at the event or posted out to customers whose details were known. It's a cost-effective way of reaching large volumes of customers or visitors. It does however have a significant 'hidden' cost associated with processing of the completed surveys and, whilst feedback may have been provided close to the point of experience, the time to process questionnaires can delay feedback

DIY surveys are increasingly popular at the moment – using one of the many free or low cost survey systems that allow you to write your own questionnaire and produce your own analysis. These surveys have their place, when you need quick answers to simple questions, but they are rarely the best primary way of getting robust customer satisfaction feedback.

Qualitative research, where you talk to just a few customers in detail is great for providing insight on why, but doesn't tell you the share of customers with that view.

For the majority of organisations an online survey is the best approach to use. The survey should typically be set-up centrally and can then be accessed through a variety of routes. Where you know your customers you can send an invitation via email



immediately after they have interacted with a touchpoint. You can hand out survey invitations to visitors with details of how to go on line to take part. But best of all you can install the survey on a tablet and make it available to visitors to your store,

your event, your tourist destination. This enables real-time survey completion and rapid analysis of the results. Visitors can tell you what they think immediately and you can take actions if you need to quickly and effectively.



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Using a tablet solution allows you to have flexibility



- the tablet can be hand-held to be passed around your patients or visitors or it can be housed in a stand that can be situated in key locations; at the entrance/exit, at the information desk, by main attractions and so on

- the questionnaire can be easily adapted to suit the immediate needs, for example a core set of questions can then be supplemented with additional ones perhaps about a particular aspect of your service or in response to changes you are making in the service you offer. The possibilities are almost endless.



3. Getting valuable feedback



We have previously looked at some methods for collecting feedback, including paper surveys, electronic surveys, telephone surveys and tablet based surveys. They each have advantages and disadvantages and some are more appropriate for certain situations than others. However, a well-designed electronic survey is usually the best method of collecting feedback to use as this gives the most flexibility and can be supplemented by other methods, such as sending a paper copy of the same electronic survey. The other advantage is the lower cost of this approach over any other.

Designing the right survey takes effort and should always be tested with at least a few real customers to make sure it makes sense to them. The key principles to consider include:

1. **Keep it short and simple** – if it takes too long to complete or is complicated your customers will not be happy and many will not complete the survey. As a benchmark, think about how long the customer is with you and how important you are to them. If they have spent 2 days at your trade show and it's vital to them then you will be able to ask them more than if they have dashed into your corner shop to buy a pint of milk!
2. Make sure you ask things that are **relevant and important** for the customer, even if you think you know the answer.
3. Think about what **other information** you have or other ways you can find things out without always asking the customer. That way you won't over-burden them. For example, your web analytics will tell you how long people spend on your website and the path they take through it, you don't necessarily need to ask visitors. You can monitor your car park to see if there are issues with it getting too full, though you might still want to ask people about it if you know it's a cause of complaint.
4. Use **customer language** and a style that's appropriate for your audience. Business to business questionnaires should be formal and straightforward. If you are gathering feedback from tourists keep it cheerful and relaxed.
5. If you are going to ask people to rate their experience think about **the scale** you use – it needs to really differentiate the great experiences from those that are simply good or good enough.

- Using a scale question makes it easier for respondents to complete, but is restricting in that they do not have the opportunity to add their own comments. Therefore using **open ended question** types can be beneficial to capture free comments, but you should be aware of completion errors and pay particular attention to where open ended question types are placed. If these are placed at the beginning of the survey, respondents will have to put in more effort to complete the survey which can seem like a burden, but if they are placed at the end of the survey the respondent is more likely to complete these as a final step.
- Remember the impact of new **GDPR regulations** when collecting personal information and take care to ensure you handle and process personal information correctly in accordance with the law.

Device specific design



- 2-3 questions
- Not too many words
- Really simple answer scale
- Vital questions first



- Maximum 10 questions
- An individual question should fit on one screen- no scrolling
- Not too many words
- Caution with respondent comments boxes



- More scope to ask more detail
- Scrolling should be avoided if possible
- Can include more complex questions if needed

Choose the most appropriate way to collect answers to your electronic survey. You can send private links to customer's email addresses if you have them, personalised with an invitation which may encourage them to respond as it is a more personal and shows you value their feedback individually. These can also be sent manually or according to a schedule, making collecting feedback convenient and less labour intensive for employees. You can also embed a public link on a website or social media, which can be easily shared and accessed so may reach a wider pool of customers, but might result in incorrect responses and misuse as the link is available to all. Providing a survey via a tablet within a kiosk may also be misused or result in completion errors, so collecting feedback via a handheld tablet with a member of staff can be a good option to increase engagement and provide actionable results, but this is a labour intensive method.

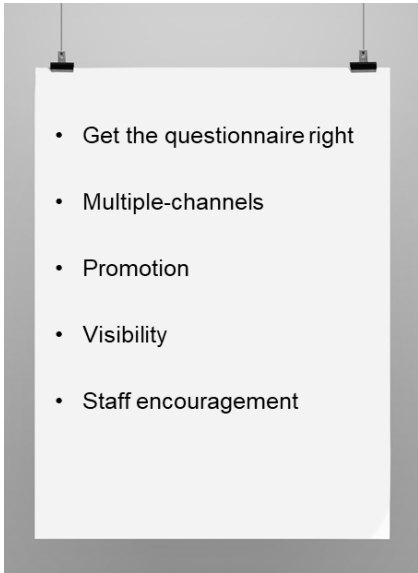
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You may need to adapt your survey so suit the devices you are expecting people to use when taking part. In simple summary the smaller the device the shorter and simpler the questionnaire needs to be



Once you have your survey designed and set-up the next challenge is to encourage people to complete it. There are many options and we do recommend you make use of some or all of these techniques to maximise response rates.

1. Promote the survey, whether through personal invitations to take part, invites on transaction receipts, email invitations and so on. Make sure people know that their experience matters to you and that it is easy for them to share their opinions
2. Make sure the survey is visible, use a branded stand for the tablet, put posters around your site, promote it in publications and on your website
3. Get staff to encourage completion. This has to be handled carefully as it does run the risk of introducing bias, but there are many ways staff can help encourage feedback
4. On arrival, staff can introduce visitors to the survey and ask them to complete it before they leave
5. At the point of transaction, staff can ask customers to take part
6. At events it can be helpful to have some staff near the tablet encouraging participation

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- Get the questionnaire right
 - Multiple-channels
 - Promotion
 - Visibility
 - Staff encouragement

4. Maximising the insight and value

We are going to look briefly at 5 topics in this section:

1. Big Data and some of the truths and myths
2. The value of combining customer feedback with other data sources
3. How to keep the analysis and insight relevant for your organisation
4. Advanced analytics, when and how to use them
5. How to share the feedback effectively

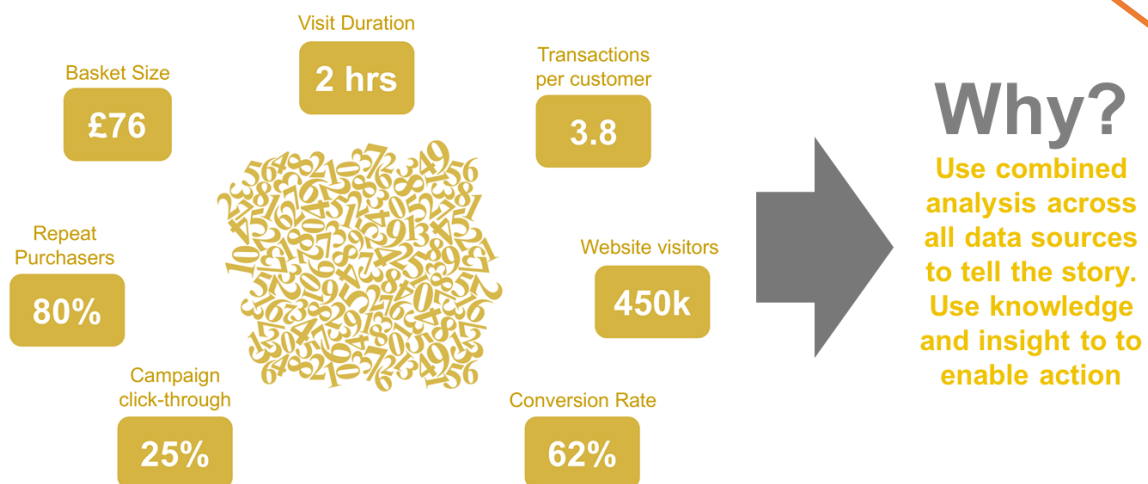


Big data is much talked about, often as a replacement for gathering information and insight from customers. The idea that we can know everything just by looking at data is a much debated topic. It's true we can find out a lot more than we used to be able to just from the data at our fingertips:

1. Visitor analytics can tell us all sorts of things about our customers – how many, how long they stayed, whether they transacted, what they saw and so on. But it won't necessarily tell us what they liked and didn't like
2. Transaction data can tell us what was purchased, what was in the basket, whether spend is increasing or not. What it can't tell us is whether the customer got all they were looking for or whether they purchased something on impulse
3. Customer data can tell us about habits and behaviours, frequency of purchase, spend, lifetime value and so on. But it can't tell us if they wanted to shop more often or if they wanted to buy more
4. Web analytics can tell us a huge amount about website interaction, duration, path, pages visited even other website usage if tracking tools are used. But we don't know if that was what the visitor wanted to be doing. Did they spend a long time because they were interested or because they couldn't find what they were looking for?

So yes, big data can help paint the picture but it still can't tell us everything and in particular can rarely tell us **why**.

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Consequently, there is huge value in combining big data with other information, Combining with customer feedback can help to understand and explain. For example movement in sales volumes may be understood through customer feedback on availability of the products they were looking for. Increasing visitor numbers may be explained through understanding why people visited (saw an advert, recommended by a friend etc.) Repeat visitor numbers may be down, customer feedback may highlight an issue with the experience that can be addressed in the future. Combining data sources will always provide deeper insight.

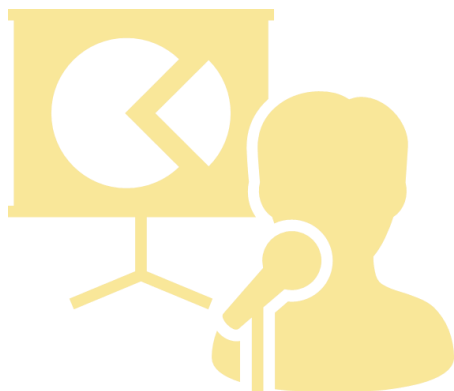
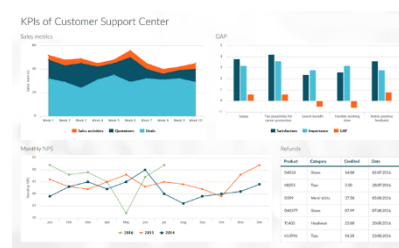


Avoiding data overload in your organisation can be challenge, so when analysing customer feedback make sure it is relevant. The Key to this is rapid turnaround, getting results out quickly to those who can take actions is important.

Collecting feedback is most valuable when the results allow for targeted and actionable improvement. Once the results are in, using them to contribute to improvement helps to get the most value from the feedback activity and shows consumers that you take their views seriously.

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Consider the best format in which to share your report, both internally and externally. This includes using software to create dashboards, providing a high level view at a glance of important information which can be shared, or embedding a link to the report on websites or social media which increases the accessibility and means the results will reach a wider pool. Sending the report via a newsletter or private email provides the opportunity to include a personalised note, and shows customers you value their opinion, as it demonstrates “You Said, We did”.



In a similar vein make sure you share the right information with the relevant audiences. Not everyone needs to see all the data every time.

- Leadership teams typically need to know the headlines and the main focus areas.
- Individual teams need to know the overall customer sentiment and the feedback for their areas of responsibility.

- Sharing too much information can make it hard for the audience to work out what's important for them.

- Linking outcomes to insight is key. Creating Action plans or storyboards with your team highlighting areas of success and improvement can open a discussion and help team members feel accountable for improvement actions and involving them is motivating and empowers them.

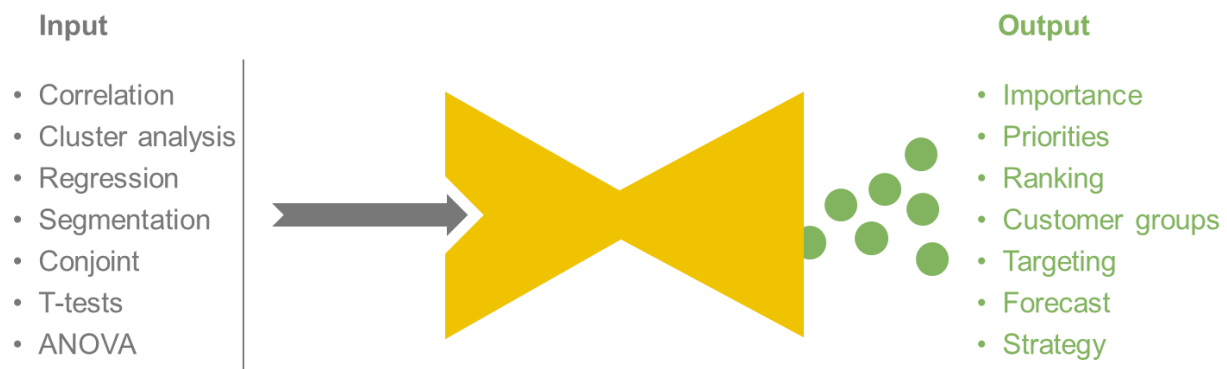
Sharing customer feedback effectively is perhaps the biggest challenge of all. Engaging your whole team in what customers are saying is vital if you are to deliver ever better customer experiences. The principles for achieving this are very similar to those for questionnaire design

1. Keep it simple and focused; share the outcomes and implications that are most relevant to the audience
2. Use the styles of reporting that will resonate best with your audience – charts, infographics and workshops are often more effective than dry, written reports

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3. Make sure the priority is always on the 'so what', if there isn't an obvious resulting action then the data may not be important. But in this case remember that keep doing what you are currently doing is an action!

Advanced analytics is something that for many is a daunting topic area, but in simple terms it is about using statistical analysis to increase the amount you can learn from the data. The most valuable techniques in customer experience research will help you to understand what is most important to your customers. If you know what has the biggest influence on their overall opinion you can prioritise your actions to those areas. It's not always the obvious things that make the biggest difference and people are not always able to articulate what matters most, hence the use of advanced analytics to help uncover the truth. We can look at what delights your customers and what causes them distress. We can look at patterns of consistency or inconsistency in service levels. We can explore how different customer groups feel and trends over time. All these and other techniques provide you with a deeper understanding of your customers and from that you can make more informed decisions to improve the customer experience further still.



Software packages such as that provided by Webropol give you access to a host of analytics including these professional statistics or Text mining solutions to provide greater insight into the data collected and can be used to monitor trends and correlations, including word clouds which are easy to understand so can be effective when sharing with a wide network of people. Webropol and XV Insight can provide training and support on both software usage and how generate the best insight from it.

5. Maintaining a customer-centric organisation

We've seen how happy customers are the key to a successful business. In order to know if your customers are happy you have to engage with them and get their feedback. But then you have to listen to what they say and act on what they want. Doing customer research and leaving it in a box to gather dust is not enough, you have to have the voice of the customer running through your organisation.



So what does a customer-centric business look like? The start point is to make sure the whole organisation knows who the customer is and what they want. There may be different types of customer with different needs. It's important that those are understood and everyone knows how their needs differ and perhaps which ones are most important.



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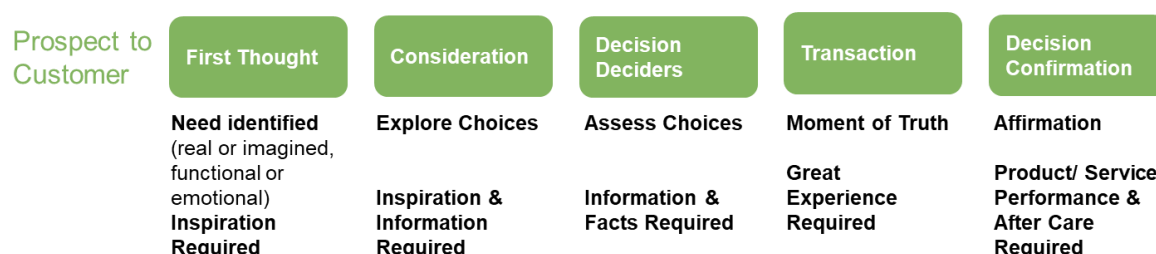
Some companies have personas of their customers in meetings. When decisions are being made they check what their customer might think. If the whole team really knows the customers and tries to see the business from their perspective then that persona may not be necessary. However, it's not always easy to see things from the customer perspective.

- how can your team know what it feels like to come to your venue for the first time - they last did that several years ago so they know their way!
- people who work in the automotive industry rarely know what it's like to buy a brand new car, they don't go through that process and if they do it is with a huge brand bias attached
- a healthcare professional is not a 'normal' patient – they know the jargon and the process behind the outward facing experience

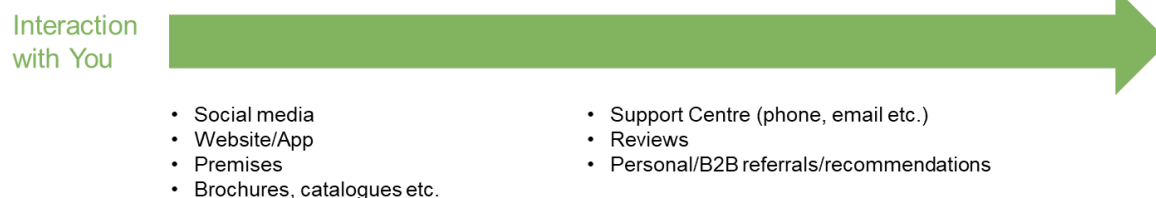
Sharing customer feedback widely and regularly is an important part of ensuring the customer is at the heart of the business.

An important tool in this process is to understand the customer journey. Mapping out every step they take from first identifying the need or desire for a product or service that you provide, though seeking out ideas and information from you and your competitors, making the final decision, completing the transaction and using any after-sales support or follow-up.

Shown linearly for simplicity of communication



Media – Owned, Earned & Paid



Most journeys are, in reality rarely linear or done in isolation. Stages in the journey overlap, individual purchase journeys overlap, paths change, late decision influencers impact behaviour and some journeys are never finished. This only increases the importance of understanding how people interact with you and with your competitors.

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Customer-focused management team

Building a customer-centric organisation takes time and commitment, with a customer-focused leadership team in place.

By knowing your customers you will also understand your true competitors, the organisations your customers consider alongside you. This knowledge will then inform your strategy, ensuring your priorities and actions are centred on the customer needs.

Really understand your customer

Know your market and competitors

Empower customer-facing staff

A key area overlooked in many organisations is empowerment of customer facing staff. How annoying is it when a staff member has to seek out higher management to authorise a refund or replacement for obviously faulty goods. The organisations that

enable customer-facing personnel to make judgement calls and support customers typically have less dissatisfied customers

Once these core principles are in place tracking of performance against customer-focused KPIs is important to maintain and improve the customer experience.

Measure metrics that matter

Use insight to drive continuous improvement

An important part of building a customer centric organisation is collecting continual feedback, at an interval suited to your organisation. It is not enough to collect feedback once and become complacent as customers may use your service many times and have differing experiences. The

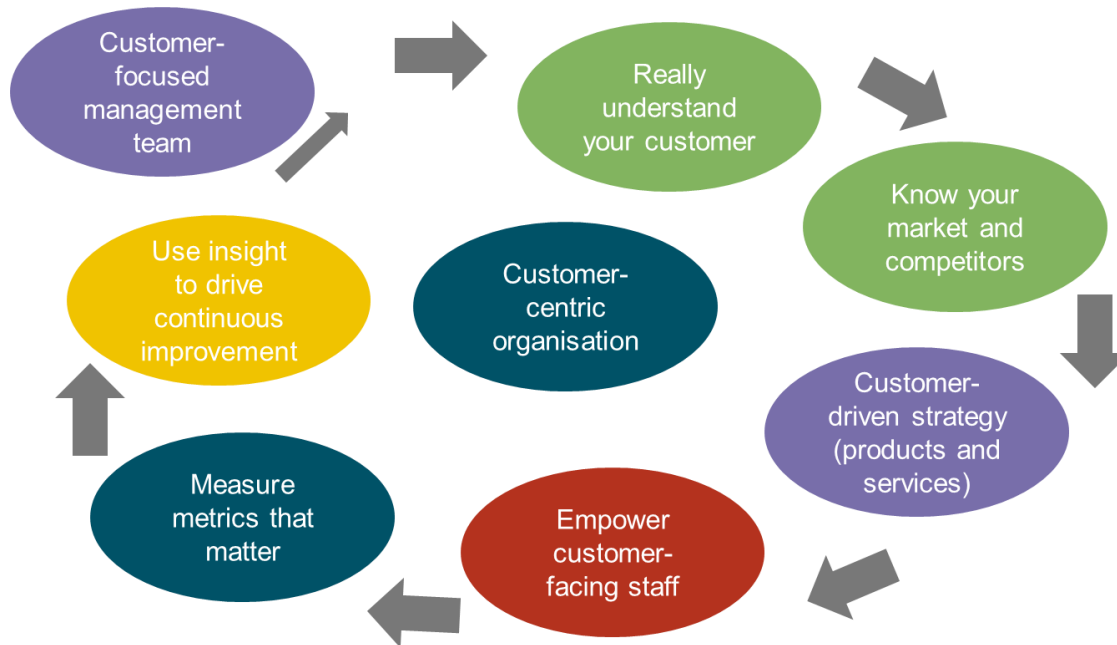
feedback collection intervals will depend on the organisation type. For example, a retail outlet could use a kiosk based survey which allows customers to give feedback at the point of transaction at each visit. Other organisations providing a service may benefit from collecting feedback on a quarterly basis. However, be aware of survey fatigue. Demanding feedback after every visit can be tiresome for customers and make them unlikely to give feedback – or worse, they may give a negative review due to feeling pestered

Therefore every successful customer-focused organisation sets goals and monitors progress. Setting goals is not about saying we want 10 out of 10 for everything, it is about being challenging but realistic. Setting goals based on movement from current performance, available resource and achievable timing is key to getting buy-in and achieving those goals

Customer-centric organisation

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A continuous cycle of monitoring progress, rewarding success and updating goals to meet changing customer needs should be an embedded process within every organisation.



It has been proven many times that standing still in customer service levels is not an option. Providing the same service levels as last year is unlikely to generate the same level of customer satisfaction. Expectations are on the increase all the time in all aspects of life so organisations need to keep improving the services they provide.



Alice in Wonderland

“It takes all the running you can do to keep in the same place. If you want to get somewhere else, you must run at least twice as fast as that!”
said the queen.

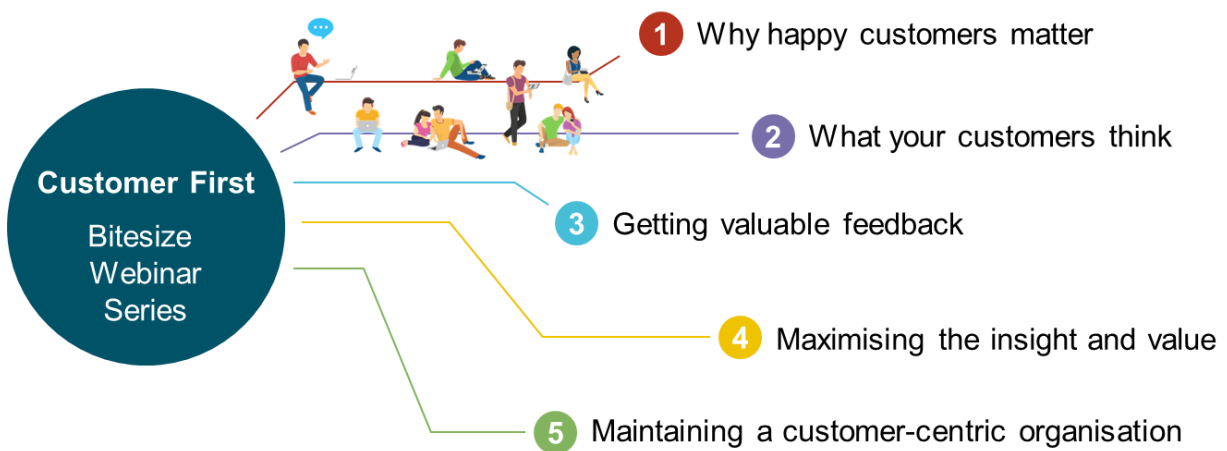
This content comes from a series of short webinars in which we share our perspective on how best to understand your customers experiences and how to ensure they are happy and loyal. They are jointly produced by Webropol, a web-based survey and analytics tool provider and XV Insight, a market research and insight consultancy



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You can view the full set of webinars on [YouTube](#) or if you'd like more information please get in touch:



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