

Savanta:

# Customer Experience CXP Audits

Putting personalisation at the  
heart of future innovation



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make better decisions.

# Personalising relationships with your customers to drive brand success



In short, personalisation is about using what businesses know about a customer to build an individual relationship with them. Offering them advice or products based on known behaviour or preferences. It is not a means of selling or marketing products or services that they do not want or need, but helping them make choices that will delight and enhance their relationship with the brand. Showing they know them and they care about them as individuals will always add to the customer experience overall, increase loyalty and add lifetime value.

Most firms will do something in this area but equally most could do a lot more (either to offer a personalised experience now or to plan their future data collection processes such that personalisation can be put at the heart of their future innovations).

Those businesses that have a strong digital relationship with their clients were not surprisingly amongst the first to embrace personalisation in a big way. It is clearly at the heart of the best performing online retailers – Amazon for example. However, it is not restricted to this core area, and indeed, we often use Tesco Clubcard as an example of great personalisation making a huge business impact outside of a digital relationship.

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**Data is the trigger that allows personalisation and a lack of it is the greatest barrier to being able to do so.**



# Understand your data

But there is also a need to understand what data is. In this case it is about remembering that every piece of data relates to an individual and the core is thinking about how that data can be used on an individual by individual basis (rather than at an aggregated level). It is not just about offering a great customer experience but offering each customer an enhanced experience based on what you know about them as individuals.

Whilst personalisation has been a buzz word within the industry for a while, we have noticed recently a distinct movement from it being something that will surprise customers to something that is now expected. This movement to expectation is really important. It means that whereas historically not offering a personalised experience could put a business at a disadvantage in comparison to early adopters, it is now much more the case that not doing it will disappoint customers (driving down the customer experience overall, with knock on effects to loyalty and revenue).

## **Customer Expectations**

Customers now expect that you will use the data you hold on them to make their interactions with you easier and more relevant – this is particularly important for service providers. For example, for train operators it is providing details that will impact a journey in advance, during and after the event (advising on alternate connections during a delay, automating compensation claims etc). Where paucity of data prevents this from happening it is important that organisations prioritise the collection of data to allow this to happen.



# CXP Audits

**Savanta CXP audits helping brands use their data to provide a personalised experience**

Savanta is experienced in conducting audits of clients' data, looking at the customer data they hold and advising on the analysis that can be done to improve their understanding of these customers. This equates to identifying data and aggregating it to find insight. We have vast expertise in interpreting data and advising clients how to provide a better customer experience (including personalisation of this experience) using primary and big data analytics.

Using these specific skillsets we are very pleased to announce the launch of the Savanta CXP audits. These audits allow us to fully understand the data clients hold on their customers at every touchpoint and interaction of the customer journey and whether this data is being used to personalise the experience.

## **CXP audits enable us to help clients understand how they can:**

- Use their data better to provide a more personalised experience;
- Build systems to better collect data;
- Visualise what a more personalised experience would look like.

All of which is verified by customers and internal stakeholders (including looking at feasibility).

## **CXP Audits are conducted by a team of customer experience specialists and data science experts.**

We map the customer touchpoints and identify key stakeholders for each touch point (who, within an organisation, is responsible for the CX at that point and who holds the data or what is known about individuals at this point).

Through in-depth discussions with staff and customers we are able to highlight how well the organisation is doing in terms of meeting customers' expectations of dealing with them as individuals.



# What we deliver

**Our comprehensive insight reports demonstrate for every touchpoint:**



**The data collected at individual customer level**



**How this data is used to personalise the experience**



**How data collection can be improved to increase knowledge of individual customers**



**How current and future data could be better utilised to improve the levels of personalisation**

Primary quantitative research with customers can also be used in conjunction with the audit to provide a Savanta CXP Index for the business. These scores can then be used as KPIs in the future to monitor progress towards a business optimising its customer personalisation.

The ultimate aim of the CXP Audits are to raise the profile of personalisation throughout the client's businesses, particularly amongst key decision makers. Allowing businesses to develop plans to take advantage of short term wins, whilst at the same time developing longer term strategies to improve personal relationships and maximise customer experience, retention and sales.

# Savanta:

Savanta is the full-service global market research and data insight company that helps businesses make better decisions.



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