

THE VALUE OF **MAKING** IT EASY

HOW B-T0-B FIRMS PROSPER BY IMPROVING
CUSTOMER EASE OF DOING BUSINESS



WALKER



WALKER

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IT'S SIMPLE

THE TIME FOR MAKING IT EASY IS NOW

Who can argue with simplicity? In our fast-paced, multi-task world, people savor the times when performing a task, considering a decision – even making a purchase – is easy. There are countless books, websites, blogs, and other publications devoted to simplifying our lives – advice and recommendations for making things easier. It's becoming part of our culture, and not surprisingly, it's become a priority for today's B-to-B companies as well.

Why are “ease of doing” initiatives becoming so important for B-to-B firms? In a nutshell, customers are looking for a simplified experience. Armed with the Internet and new technologies, today's B-to-B customers are highly informed, and as a result, they're empowered like never before. Ease of doing business means eliminating the complications and clearing the clutter.



COMPANIES SAY:

80%

of B-to-B organizations are focused on improving ease of doing business

ONLY 57%

say they are effective at making it easier for customers to do business



CUSTOMERS SAY:

LESS THAN 40%

of customers describe common interactions with companies as “Easy”

MAKING IT EASY. WHY IS IT SO HARD?

The quest to make things easy can often be hard. The sheer complexity of B-to-B companies may explain why it's difficult for some firms to envision, plan and execute initiatives that focus on simplicity. Consider the following:

- Companies are predominately organized by function, allowing limited collaboration
- Supply chain relationships are complicated for companies and customers to navigate
- Customer-focused activities often lack executive sponsorship and leadership

IF COMPANIES ARE ALREADY ENGAGED, WHAT'S THE POINT?

If we agree that customers want simplicity, and we're aware that companies are actively working on making things easier, why the need to take a closer look? While intentions are good, we know that B-to-B companies often fall short in executing initiatives that promote ease of doing business. As part of our study, we found that just 57 percent of companies believe they are effective at making it easy for their customers to do business with them.

THERE'S BIG PAYOFF FOR CUSTOMERS *AND* COMPANIES

Simplifying the customer experience is more than a courtesy. Its potential is vast and tangible. There is clear evidence that customers make financial decisions based on how easy it is to work with companies. Combine this with the increasing power that customers have in the evolving marketplace – where information about competitors and product options is just a mouse-click away – and there is a compelling case for why B-to-B firms should invest in improvements necessary to ensure their customers enjoy a smooth experience through all key phases of the customer relationship.

Efforts to simplify aren't just for the benefit of customers. It makes good sense for B-to-B firms to fast-track ease of doing business initiatives. By simplifying processes and streamlining the experience, companies stand to gain operational efficiencies, which can lead to huge cost savings and other business benefits.



COMPANIES SAY:

“Reducing face-to-face services and shift to e-channel to cut internal cost and customers management cost.”

“Our renewal rates with our customers have significantly improved with one of the initiatives that we implemented almost a year ago. By restructuring our customer-facing teams, we have created easier and higher-level (service manager) access for most of our customers. We are able to spend more time in front of customers building the partnership rather than just responding to requests.”




CUSTOMERS SAY:

“In short, if it takes more than a few steps to reach my objective, I will be frustrated. Also, if information is not presented in a clear, easy to follow manner then the experience is not satisfactory. I think about all these factors in my own business and how to improve daily.”

“As a consumer, if I don't get the level of service I am expecting or the product is not of good quality, I don't shop there anymore ... same with B2B.”

WALKER'S EASE OF DOING BUSINESS STUDY

Walker took a dual approach to studying the topic of Ease of Doing Business. We examined perceptions from both customer experience professionals and customers in the B-to-B industry. This unique approach allowed us to assess similarities and differences, all with the goal of identifying ways in which B-to-B companies can improve customer experiences.



ACKNOWLEDGING THE “AMAZON EFFECT”



CONSUMER EXPERIENCES RAISE THE BAR

Our experiences as consumers, in the era of buying almost anything with just a few clicks, have paved the way for similar expectations for the B-to-B customer experience. As we consider what we're calling the "Amazon effect," it's only fair to point out that a number of B-to-C companies, including Apple, Google and eBay, have received praise by customers and peers alike for their commitment to simplicity and their conscious efforts to make the customer experience easy. However, in the surveys and interviews used to prepare this report, Amazon was mentioned time and again by both B-to-B customers and customer experience professionals as the bellwether.

AN ‘OBSESSION WITH CUSTOMERS’ TAKES HOLD

How did Amazon become such a big deal that so many respondents would single it out? It’s pretty simple. Amazon is obsessed with customers and the customer experience.

“We see our customers as invited guests to a party, and we are the hosts. It’s our job every day to make every important aspect of the customer experience a little bit better.”

— Jeff Bezos, Founder, Amazon.com

Since opening its online doors in 1995, Amazon has never wavered from its commitment to simplicity and a customer-first mentality. In fact, the company was built upon these fundamental principles, and the drive “to be earth’s most customer centric company” has continued even through explosive periods of growth.

Amazon’s resistance to follow market trends and insistence instead on creating trends in the marketplace were born from a unique approach to business that centers on the following:

- Strong focus on attaining long-term customer loyalty (often at the expense of short-term profit)
- Execution of unmatched customer service
- Determining what customers want before they buy it
- Tracking dozens of metrics, specifically related to delivery delays, defects and out of stock

In short, Amazon’s business approach – some of it groundbreaking for the B-to-C industry – has set a new standard in e-commerce that has implications for all business sectors, including B-to-B.



COMPANIES SAY:

88%

see their customer expectations
impacted by consumer experiences



CUSTOMERS SAY:

77%

of customers say consumer experiences
influence B-to-B expectations

ARE CONSUMER EXPERIENCES RELEVANT TO B-TO-B?

In highlighting Amazon as a distinctive leader in e-commerce, we do so with the clear understanding that buying a consumer product, such as a book or a pair of shoes, is vastly different from the complex purchasing processes inherent in B-to-B.

It's also important to remember that Amazon had the luxury of building its business from the ground up with simplicity and customer focus as the building blocks. For B-to-B companies that have had processes in place for years, achieving such ease and simplicity requires concerted, deliberate efforts to re-think, re-invent and re-build.

Still, there's relevance here. We illuminate the differences between consumer purchases and the B-to-B customer experience merely as an acknowledgement and not as permission to wave off the important lessons B-to-B firms can learn from the consumer marketplace. In the end, the expectations that customers have for simplicity and streamlined experiences still apply. Knowing that customers not only appreciate ease of doing business, but also equate it with simplicity, B-to-B firms must look inward to find efficient ways to comply regardless of the complexity.

How can this be done? We believe it starts with companies taking a closer look at what people most appreciate about their consumer experiences today. Our research findings point to these three priorities:

- Viewing experiences from the customer perspective
- Simplicity in all areas of interaction
- A truly personalized experience

The lesson Amazon and other B-to-C companies that champion ease of doing business teach us, is that customers are looking for ease and simplicity in their interactions with companies in any sector. The "Amazon effect" isn't going away; in fact, it's likely to become even more pronounced in the future. Need more incentive? Amazon is currently entering a number of B-to-B markets and could be your next competitor!

AMAZON MISSION STATEMENT:

OUR VISION IS TO BE EARTH'S MOST CUSTOMER CENTRIC COMPANY; TO BUILD A PLACE WHERE PEOPLE CAN COME TO FIND AND DISCOVER ANYTHING THEY MIGHT WANT TO BUY ONLINE.



CUSTOMERS SAY:

"Amazon is a perfect example – it could not be a more effortless and seamless purchase experience. Research the product, buy with two clicks, delivered free within two days."

"I want a purchase experience similar to that found using Amazon."

"Amazon keeps you informed about delivery from order to delivery."

A green-tinted photograph of a city skyline. In the foreground, a multi-lane highway with a concrete overpass is visible. Several cars are on the road, and their motion is blurred, suggesting a long-exposure shot. In the background, several tall skyscrapers rise into the sky. The entire image is overlaid with a semi-transparent green filter.

SIMPLE SUCCESS



SPOTTING TROUBLE

Ineffective and disorganized processes catering more to company than customer not only cause difficulty and frustration for customers, they detract from a company's ability to be efficient – and in the end, more profitable. What will it take for firms to be more successful at “simple?” To help answer this question, Walker queried B-to-B customers about their interactions with companies to uncover where challenges exist. The results offer insight – and infer some potential strategies – for helping B-to-B companies create a customer experience customers currently desire, and in the future will require.

WHERE ARE THE TROUBLE SPOTS?

Gaining insight about how B-to-B companies can simplify the customer experience begins with determining how and where firms currently fall short. Walker surveyed both customers and customer experience professionals for feedback on various customer interactions, or touch points, to find out where difficulties exist.

We broke it down into the following five areas that are common to most B-to-B companies and asked customers to indicate what obstacles they face:



PURCHASE PROCESS

- Not enough guidance on what to buy
- Pricing is difficult to find or too complicated
- Self-service portals are complicated and difficult to navigate



LEAD TIME/DELIVERY

- Lead time doesn't meet requirements
- Delivery delays or delivery doesn't meet the agreed-upon time
- No self-service access to updates



INSTALLATION/ONBOARDING

- Self-service training difficult to navigate
- Product/service is too complicated to figure out
- No structured knowledge transfer



PRODUCT/SERVICE EXPERIENCE

- Product does not perform as expected
- Doesn't understand how to use features
- Complexity impacts usability



CUSTOMER SERVICE/SUPPORT

- Support requests take too long to resolve
- Self-service portals aren't organized to effectively solve problems
- Customers don't know who to contact; representatives lack knowledge

WHAT IS IT ABOUT SIMPLICITY?

Why do we crave simplicity? We're constantly overwhelmed with choices and bombarded with unlimited options. This explosion of colors, varieties, sizes, features, speed, and power has many of us yearning for simplicity. When buyers are faced with too much complexity, they are likely to take no action at all because they are simply overwhelmed with information and choice.

Knowing customers' "pain" in each phase of the lifecycle offers important guidance for B-to-B firms, especially in identifying areas where simplifying the experience can be most beneficial. If these are the real issues at hand, it's fair to say that effectively addressing them will go a long way in helping companies realize the proven business benefits that result from increased simplicity.

WHAT ARE THE ANSWERS?

There are many tactics companies can deploy, but two areas stand out as effective simplification strategies. For B-to-B companies to successfully simplify the customer experience, effective self-service is a must have. It's arguably the answer to overcoming many of the obstacles customers face every day – not to mention the efficiencies and benefits self-service can create internally. However, self-service is not the only answer. Personal interaction for some business models and situations is the critical answer to simplifying how customers engage with companies.

Elevating both initiatives to positions of strategic importance is essential to meeting customer expectations for a desirable experience. In terms of making it easier for customers and taking advantage of the benefits of simplified processes, B-to-B companies will have to deliver both – sound self-service options and valuable personal interactions – to be successful.

THE ANSWER – EFFECTIVE SELF-SERVICE

Whether a company is successful in making it easy for customers depends largely on the strength of its self-service offerings. B-to-B firms must provide better, more intuitive and more effective self-service portals for customers. Although most B-to-B companies have some form of self-service in place, odds are the portals are terribly complicated, plagued by poor navigation and design, and not very useful or user-friendly. For example, customers may have to wade through layers of menus to find product specifications or pricing. There is often no easily identifiable method for asking questions or seeking support. Follow up and delivery or status updates may be non-existent.

So, what makes self-service effective? Taking a close look at our most recent research with B-to-B customers, the following characteristics stand out as the most important when considering self-service:

- User-Friendly
- Personalized
- Informative
- Interactive

B-to-B customers are searching for easier ways to purchase products, check delivery status, and seek service and support. Because these common lifecycle experiences are troublesome and complicated, customers have difficulty navigating them. Effective self-service can be the key to streamlining these experiences, saving customers time and minimizing effort.

USER-FRIENDLY

Make certain the user interface is tailored for the business needs of customers. Ease of navigation and ease of accessing on a mobile device are key customer desires.

INFORMATIVE

Companies need to make sure transparent product information and pricing are easily accessible by customers. Bonus information would include detailed product specifications, reviews, and tutorials.

PERSONALIZED

Companies should be looking at self-service portals as a way to customize product recommendations for customers. Tracking buyer's history and making tailored product recommendations based on past purchases are customer desires.

INTERACTIVE

Customers want to use self-service to check on order updates as well as clearly track down who to contact if there is an issue.

WHAT ARE THE ANSWERS?



CUSTOMERS SAY:

“An easy to do business with company is immediately responsive with employees empowered to assist the customer right away. The discussion is not about the next sale or something the company wants but is all about how I can be helped and a problem solved.”

“Courtesy! Forthrightness in answering questions I may have and/or being able (and willing!!!) to admit their shortcomings and a need to ask for assistance. The humanness of the interaction is extremely important!”

“Easy to contact the correct person for the specific issues. Proactive contacts to check up on us. Being prepared when talking with us to understand where we have already been in order to save time.”

THE ANSWER – EFFECTIVE PERSONAL INTERACTIONS

Responsiveness. Flexibility. Transparency. Friendly demeanor. When we asked customers, unprompted, what they expect from interactions with company representatives, these characteristics were most frequently cited, indicating their importance in defining a positive interaction. On the surface, they don't look like difficult requirements to fulfill. However, when considering the organization and structure of many of B-to-B companies, these characteristics can become elusive.

Inefficient organization and silos create a scenario in which customers tend to be handed off from department to department or person to person in the hunt for issue resolution. Customers are thereby forced to learn the company's business model, often navigating solo through a maze to find the right person or department for answers. B-to-B customers know what they want from their account teams and customer service personnel. In short, they're looking for a proactive partnership and personalized service.

ACCOUNT TEAMS

- Understand my business objectives, goals and challenges
- Provide me with proactive recommendations for products/solutions that align with my business objectives
- Challenge me – I'm not looking for an order taker
- Help me avoid risk in my business

CUSTOMER SERVICE REPRESENTATIVES

- Be easily accessible
- Be knowledgeable about products and my business
- Truly listen to my issues
- Know when to involve other areas of the company and make an efficient connection
- Be friendly

To provide what customers want and to facilitate effective communication in general, B-to-B firms must start looking at business processes from the customer's perspective. This requires thinking critically about how company organization and silos truly affect the customer experience. Acknowledging that sweeping changes in organization and functionality can't be made overnight, there are strategies B-to-B firms can enact now to speed the development of simpler methods and promote ease of doing business.

ORGANIZE EFFECTIVELY

- Work to compensate for existing silos; assemble logical work teams to address customer concerns
- Break down barriers to resolving customer issues; respond swiftly with solid answers and solutions
- Appoint a leader to head up customer experience efforts

HIRE AND TRAIN

- Be deliberate about hiring only those people with the qualities and characteristics that support a strong focus on the customer
- Provide appropriate sales enablement and customer service training for those who have frequent contact with customers

EMPOWER

- Identify the touch points in which customers frequently encounter red tape
- Review and modify policies that may restrict account teams and customer service representatives from being proactive on behalf of the customer
- Encourage associates to act in the best interests of the customer whenever possible and reward such efforts

IT'S EASY TO SEE WHEN
SIMPLICITY
RULES



WHAT DOES ALL OF THIS MEAN?

There's little doubt that ease of doing business is a strategic priority B-to-B companies must address as they plan for the future. In this report we've discussed how and why simplicity matters, how it's impactful and what companies can do to make strides in this area. Based on the results of our study and what we know from working with B-to-B firms across a variety of industries, customers are not likely to abandon their desire for simplicity any time soon – if ever. That means firms must act now to ensure they stay ahead of the pack when it comes to making the customer experience easier.

BECOMING SIMPLE

For companies to meet customer needs and compete effectively in an evolving marketplace, they must invest in self-service and creating valuable personal interactions as a way of simplifying customer interactions. Now more than before, the customer is in the driver's seat and will dictate self-service as an option for getting things done quickly and easily.

Further, companies must ensure that self-service options are effective. It's not enough to simply have a website or self-service portal – the site or portal needs to be well organized, clear and informative. A company's investment in user interface design will be offset by the efficiency gained by allowing customers to easily navigate and make purchases on their own. Effective self-service, tailored to customer demands for simplicity, ultimately means fewer calls to customer service and fewer escalations.

While self-service is key, it will never fully replace the need for knowledgeable customer-facing associates. Company investment in targeted training and hiring will result in more efficient account teams and customer service associates that consistently deliver for customers. Costs of training will be offset by growth attributed to account and customer service teams that proactively guide customers and create experiences that keep them coming back.

WHERE TO GET STARTED?

This report provides a global view of ease of doing business as it relates to the B-to-B industry. How individual companies decide to apply the insights and findings included in this report will vary depending on multiple factors, including the type and size of the company, how it's organized and who it serves.

Given that methods for achieving simplicity in any given firm will be customized, Walker has provided a general framework and next steps for how B-to-B firms, regardless of the variables mentioned above, can logically approach ease of doing business. Many already have a good start. As noted earlier in the report, most companies – more than 80 percent, according to our study – have already implemented at least some initiatives focused on simplifying the customer experience.

DIAGNOSE, TREAT, MONITOR

What's the first thing you do when you're ill or injured? You may visit the doctor to learn more about what's really going on. After an exam and maybe some tests, the doctor offers a diagnosis and prescribes treatment. Follow-up visits may be scheduled at regular intervals, too, to ensure the problem is resolved and health is restored. We can take a similar approach to tackling a complex business problem like simplifying the customer experience. Here's how:

DIAGNOSE – IS THERE REALLY A PROBLEM?

Is ease of doing business a real concern for your company? Schedule a check up to get a proper diagnosis. Begin by working internally with customer-facing teams to get their take on the trouble spots. In which phases of the experience do customers often stumble or have difficulty finding quick resolution? What barriers exist internally to serving customers simply and efficiently? Arriving at a diagnosis also means talking to customers to get their perspective. Both quantitative and qualitative feedback will help isolate areas that are redundant, painful or complicated.

APPROACH – Conduct a customer journey mapping exercise. Understand what customers truly want – the real moments of truth and the ways in which customers go about achieving their needs. A journey map provides a complete picture of the customer experience. Companies who invest in this strategy understand the path a customer takes, the people and functions they interact with along the way, and the obstacles customers experience that make it difficult for them to conduct business with a company.

TREAT – DEVISING A PLAN

Once a diagnosis has been made and issues identified, companies can assemble the necessary internal resources to develop a treatment plan. Resist limiting these discussions to just one or two customer-facing groups – bring in all relevant departments and levels within the organization to gain buy-in and reach feasible solutions. Enlist a committed executive sponsor for these activities and ensure the process is cross functional.

APPROACH – Utilize an effective framework for driving results. Knowing the biggest customer pain points is one thing, but driving the organization to make changes can be very difficult. To facilitate the implementation of customer strategies, companies need to make certain there is a deliberate approach for enabling action. An effective framework outlines both the people and the processes needed to truly make changes to the customer experience.



JOURNEY MAPPING EXERCISE

Walker's journey mapping is designed to help B-to-B companies identify trouble spots to simplify and improve customer experiences.



DRIVING RESULTS FRAMEWORK

Walker's *Driving Results* publication provides a structured framework to enable action, prompt change, and drive results.



ONGOING MEASUREMENT SYSTEMS

Walker provides the necessary tools and analytics to help companies monitor progress and assess ongoing impact.

BECOMING SIMPLE

MONITOR – ASSESSING THE IMPACT

Once improved processes have been implemented, it's critical to track progress and effectiveness. You'll want to schedule frequent follow ups to measure the success of your investment and assess ROI. To get a clear picture, companies need to focus on quantifying both internal and external improvements to ensure ease of doing business initiatives are meeting expectations and providing true benefits for the company and its customers.

APPROACH – Implement ongoing measurement systems. Once strategies have been implemented to improve the customer experience, it is important to take the pulse of customers to make sure that the improvements have had the intended impact. Measuring ease of doing business and making certain that customers are not experiencing obstacles are pieces of feedback that can be incorporated into any VoC listening system.

An aerial photograph of the New York City skyline, featuring the Empire State Building prominently in the center. The image is overlaid with a semi-transparent green filter. The text "SIMPLICITY IN PRACTICE" is centered in white, bold, sans-serif capital letters.

SIMPLICITY IN PRACTICE

SIMPLE SUCCESS



THE BIG PAYOFF FOR CISCO SYSTEMS

THE COMPANY

Cisco Systems has shaped the future of the Internet by creating unprecedented value and opportunity for its customers, employees, investors, and partners. Cisco is the worldwide leader in networking – transforming how people connect, communicate, and collaborate.

THE BACKGROUND

An integral part of Cisco's DNA is creating long-lasting partnerships, working to identify customer and partner needs, and providing solutions that support their success. Five years ago, Cisco became focused on the Ease of Doing Business, as it was statistically identified as a leading driver of both customer and partner loyalty to Cisco.

It was within this context that the Ease of Doing Business with Cisco was created as a key Cisco priority and area of focus. The entire Cisco organization is now focused on how it can make it easier for customers, partners, and employees to do business with Cisco.

THE SOLUTION

Cisco uses insights gleaned from customer, partner, and employee listening posts to identify process improvement initiatives targeted at stakeholder priorities. These priorities are uncovered as part of Cisco's stakeholder listening system, and are the areas that are statistically validated as the most important areas of focus.

One of the most critical aspects that was identified in this process was that Cisco needed to make it easier for customers to access online support. Specific initiatives were developed to streamline processes and allow customers to quickly access information and solve their support issues, resulting in higher case avoidance.

THE RESULT

As a result of Cisco's investments in its online support website, both customers and Cisco benefitted.

The customer perspective: Visitor success in finding product support content and overall navigation has improved by more than five times compared to previous experiences. Additionally, the time it takes customers to download the right software version was reduced significantly.

Cisco's perspective: Cisco realized a tremendous efficiency savings, and quantified that an average of **350,000 technical support cases are being avoided each month**, resulting in **hundreds of millions of dollars in cost savings to Cisco**.



INTEL ADDRESSES PROBLEMS WITH SHIPMENT TRACKING

THE COMPANY

Intel, a leading global semiconductor firm, is dedicated to creating and extending computing technology to connect and enrich the lives of people around the globe.

THE BACKGROUND

As Intel was evaluating their supply chain operations through their Customer Experience Program, they identified negative customer feedback and ongoing customer complaints related to **shipment tracking and notifications**. Further investigation determined that the proper systems for providing customers with real-time shipment and tracking information did not exist, were unreliable, or were error-prone.

Without any specific focus or actions, nothing was changing in customer opinions – drawing management attention to the issue. Ultimately, resources were allocated to system and process enhancements to provide both sales teams and customers with real-time information on the status of product deliveries.

THE SOLUTION

Intel leveraged a cross-functional project team approach to facilitate the needed improvements. Logistics, Sales, and IT teams collaborated to develop a set of enhancements that include:

- Shipment tracking information was taken from disperse locations and made available in one place, available to all customers
- Advanced shipment notification was deployed to customers as requested
- Second-leg tracking was made visible to all customers
- A redesign of the Web Order Management tool to improve the interface, improve navigation, and capture additional information – ultimately improving the quality and presentation of information

THE RESULT

As a direct result of the process improvements deployed by Intel, the number of help desk queries related to shipment issues was **reduced by 47 percent**.

SIMPLE SUCCESS



CUSTOMERS FIRST POWERED BY WELCH ALLYN

THE COMPANY

Welch Allyn is a leader in the healthcare industry that specializes in helping doctors, nurses, and other healthcare providers across the globe provide the best patient care by developing innovative products, breakthrough technologies, and cutting-edge solutions that help them see more patients, detect more conditions, and improve more lives.

THE BACKGROUND

Welch Allyn created a Customers First program that is focused on engaging customers and building loyalty through quality innovation and superior relationships. This program is focused on not just the quality and performance of products, but is about the total customer experience and the value that customers receive from Welch Allyn. Through this program, Welch Allyn is focused on providing a positive experience every time a customer connects with them. An important part of this program is an annual experience survey that is sent to more than 40,000 customers around the globe.

THE SOLUTION

Based on customer feedback from the Customers First program, Welch Allyn identified the top three things that would most improve customer loyalty to Welch Allyn: product quality, timely issue resolution, and sales team engagement. Taking it one step further, Welch Allyn identified seven specific improvements that would address customer feedback across the top priority areas. These improvements were determined to have the biggest impact on customer satisfaction as well as improving how Welch Allyn conducts business with customers.

Two areas identified as impacting the ease of doing business include:

- **Providing self-help content for customers.** Welch Allyn created standardized, customer-friendly help information that is easily accessible on its website.
- **Simplified phone menu for customers.** Welch Allyn simplified its Interactive Voice Response menu options and reduced the number of transferred calls.

THE RESULT

Estimation of financial savings are in the process of being quantified around the following results:

- More than 300 self-help articles available on the new website will circumvent thousands of phone-based customer service interactions, creating cost savings while improving the customer perception at the same time.
- More than 50% of calls to a live representative are now properly routed after the 1st menu selection, resulting in efficiency and cost savings in the call center as well as an improved customer experience.



CASTROL'S MEASUREMENT STRATEGY

THE COMPANY

Castrol is an industry-leading manufacturer of industrial and automotive lubricants. The Castrol name is synonymous with premium quality, high performance and leading-edge technology in lubrication.

THE BACKGROUND

Castrol recognized that there was no one company in their B-to-B sector that was differentiating itself based on the customer experience. Existing qualitative research indicated that customers were seeking a simple, easy experience through the customer journey from ordering through to delivery and after-sales care. In addition, quantitative CSAT research showed that customers regard most players in the B-to-B lubricants sectors as about the same – and these companies were not exceeding customer expectations.

This presented itself as a potential competitive advantage for Castrol. Castrol understood that before they could deliver a differentiated customer experience, they needed to baseline the current end-to-end customer journey ... from the customer' perspective. This would reveal the main drivers of customer satisfaction and highlight the areas where Castrol can improve/lead. To do this, Castrol outlined a comprehensive measurement strategy, aimed at getting a complete picture of the customer journey.

THE SOLUTION

Castrol's measurement strategy brings together several different work streams into an integrated VoC effort that spans key growth markets and sectors. The measurement program contains two central components:

- **Customer Journey Mapping** – A workshop strategy focused on Castrol cross-functional stakeholders that are responsible for part of the customer journey. Castrol maps the key customer touch points and identifies the most crucial customer interactions that can lead to a positive or negative customer experience. The workshops focus on the areas of the experience which cause customers the most 'friction' and therefore prevent simple/easy interactions.
- **Customer Heartbeat** – A quantitative survey covering customers in key business units. Castrol measures overall customer loyalty and satisfaction levels across each aspect of the customer journey. Additionally, Castrol measures the ease in which customers can accomplish tasks in each key interaction area, including ordering, delivery, technical support, and issue resolution.

THE RESULT

Through both qualitative and quantitative inputs, Castrol has the ability to identify which areas of the customer journey are most problematic for customers and the areas in which customers find it hardest to complete important tasks. This prioritization allows Castrol to pinpoint strategic strategies for simplifying the customer experience and setting themselves apart from the competition.

ABOUT THE STUDY

The Value of Making it Easy study was conducted by Walker Information to explore how B-to-B companies can accelerate their success by making it easier for their customers to work with them. Walker holds sole responsibility for the research and the recommendations set forth. Walker executed the information gathering activities, conducted the analysis, and wrote the report. CustomerThink was an important contributor in gathering insights from customer experience professionals.

OUR RESEARCH IS REFLECTIVE OF TWO KEY PERSPECTIVES:

- **COMPANY PERSPECTIVE:** Qualitative and quantitative interviews were completed with business leaders and customer experience professionals. Participants provided feedback on what customers experience in working with companies, common obstacles, customer expectations for working with companies, and how companies are strategically focused on making it easier for customers to engage.
- **CUSTOMER PERSPECTIVE:** Quantitative interviews were completed with customers representing companies in technology, manufacturing, and logistics B-to-B sectors. Participants provided feedback on the role of ease of doing business in purchase decisions, common obstacles customers encounter when trying to work with companies, and how companies can make experience more seamless for customers.

The research team included Patrick Gibbons, Melissa Meier, Jeff Marr, Krista Roseberry, Jamaica Slicer, Sarah Walker, Joshua Gentry, and Evan Bristow. The lead author for the report was Melissa Meier and Jill Jansen served as both writer and editor. Dan McCormick was responsible for the design and layout.

Our sincere thanks to CustomerThink and all the individuals who shared their time and thoughts.

customer THINK

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. Main areas of coverage include Customer Relationship Management, Customer Experience Management and Social Business. This is the place to learn about every facet of customer-centric business management. For more information about CustomerThink, visit www.customerthink.com.

ABOUT WALKER

Walker is a customer experience consulting firm. We specialize in helping today's business-to-business companies build and maintain a competitive advantage by delivering an exceptional customer experience. Our team of senior consultants averages more than 20 years of experience and they deliver a wide range of services to meet and exceed our clients' objectives.

And it works – Walker clients outperform the market by more than six to one!

WALKER'S SOLUTIONS AND SERVICES

No two companies are alike, so we collaborate with each client to understand their business, focus on their objectives and deliver the right combination of services to accelerate their success. No consulting firm can match Walker's focus on customer experience and the broad range of solutions and services we deliver, which includes:

- Customer experience assessment programs, which result in execution-ready strategic roadmaps.
- Journey mapping services to document the customer touchpoints and focus on "moments of truth."
- Design of customer "ideal experiences," targeting problem areas and identifying opportunities for breakthroughs.
- Collection of customer insights, leveraging a wide range of methods to understand the perspective of the customer.
- Advanced analytics services to interpret customer intelligence and improve decision-making.
- A full range of technology services to manage customer data and integrate with clients' existing systems.
- Action planning and change management services to prompt transformation across the organization.
- Education and training services to engage employees and foster a customer-focused culture.

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WALKER RESOURCES

OTHER SPECIAL REPORTS AVAILABLE FROM WALKER



WALKER B-TO-B CX SUMMIT

The industry's only conference focused on the latest and best customer experience strategies for B-to-B companies. We feature powerful keynote presentations, engaging workshops, and valuable networking all aimed at sharing best practices to improve the way companies drive business success. Learn more at www.walkercxsummit.com.

WALKER WEBCASTS

We produce a popular series of monthly 30-minute webcasts on a variety of customer experience topics. Each webcast is hosted by Walker's thought leaders. Learn more at www.walkerinfo.com/knowledge-center/webcasts.asp.

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