eBOOK

MEASURING CX
GOING (WAY) BEYOND SURVEYS

WALKER

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What would you like to say to this guy?

- "Sometimes you act like you're not listening."

- "You can be pretty annoying."

- "I never hear about what you did with my feedback."

- "I can't make you go away. You're like an uninvited guest."

- "You are too long-winded!"

- "You interrupt at inconvenient times."

- "You ask about things that aren't important to me."

- "You don't look right on my phone."

- "You force me to pick a box instead of letting me talk."

- "You ask questions that you should already know the answer to."

Let's Break it Down:

- Surveys are efficient

- Surveys are easy to develop

- Surveys help understand perceptions

- Surveys answer the "why"

- Surveys are good for conducting analysis

- Surveys can provide trends and comparisons

And yet …

- There are too many!

- They're too long!

- They're too crappy!

Going Beyond SURVEYS

Journey Mapping

Journey Mapping is a collaborative way to document customer touchpoints, strengths, weaknesses, and "moments of truth."

PROS

- Excellent first step
- Great way to engage, gain alignment
- Provides both internal and external perspectives
- Develop key hypotheses to confirm/deny

CAUTIONS:

- Get the right people involved
- Make sure it is facilitated well
- Must have good follow up – Action!

Social Media

Social media can provide insights from conversations in the customer's voice – what they want to say when they want to say.

PROS

- Many different mediums to access
- It's authentic and real
- Tools, such as text analytics can make it practical and useful

CAUTIONS:

- Scrutinize the sources carefully
- Consider how representative it is of your customer base
- The context isn't always clear
- Difficult and time consuming to manage

Communities

Online communities provide a format for rich, insightful discussions among customers.

PROS

- Willing and knowledgeable participants
- Good dialogue with detailed product feedback
- Uncover trouble spots, unmet needs
- Uncover success stories

CAUTIONS:

- Set it up correctly (if you create it)
- Consider how representative it is of your customers
- Moderate carefully
- Review, interpret regularly
- Difficult and time consuming to manage

Online Panels

Online panels can provide fast feedback on specific issues from engaged customers.

PROS

- Opt-ins that are willing to share their opinion

- Builds engagement among customers

- Versatile – They are a quick way to cover a broad range of topics

- Convincing input for internal stakeholders

CAUTIONS:

- Recruit effectively

- Keep panelists active, engaged

- Circle back and share how input was used

- Difficult and time consuming to manage

Advisory Boards

Advisory boards help management prioritize issues that matter most to customers.

PROS

- Open, qualitative input

- Participants that want you to succeed

- Good, collaborative dialogue

- Allows customers to co-create solutions with you

CAUTIONS:

- Manage expectations

- Consider how representative of your customers it is

- Facilitate carefully

- Maintain open lines of communication

Ethnographic Research

Ethnographic research is a great way to see the customer in their real environment.

PROS

- Provides excellent clarity

- Helps us tell the customer story

- Great for uncovering customer problems

- Indispensable for product development

- Insight into how customers interact with solutions

CAUTIONS:

- Acquire the right skill set to conduct and analyze

- Be aware of how much time and money it will cost

- Know that decisions are based on a few observations
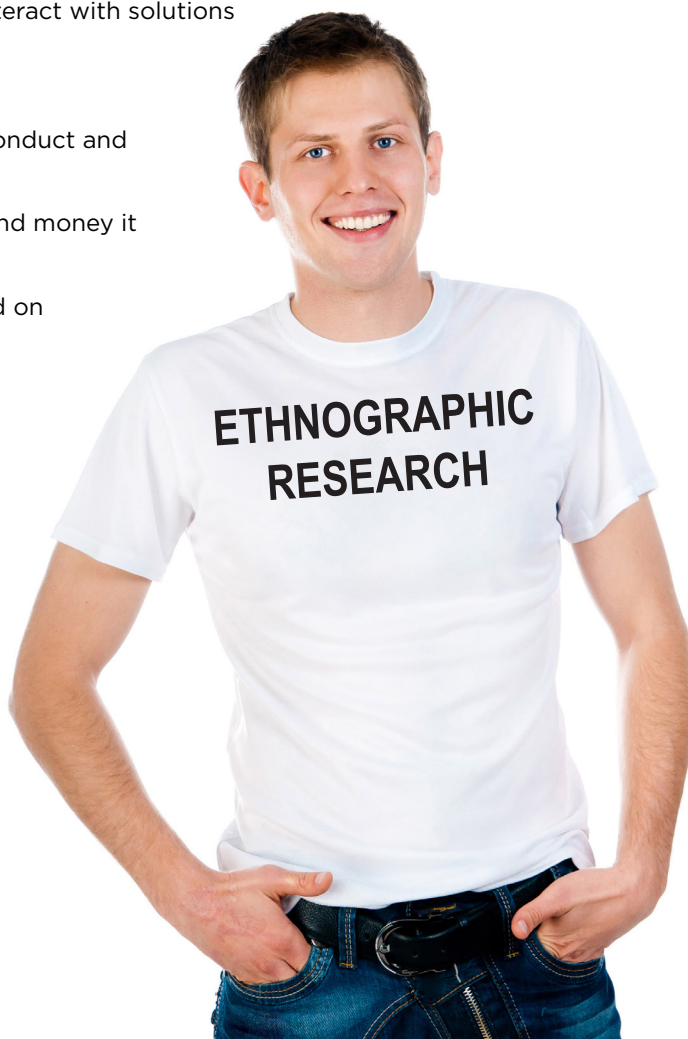
VOCE

Voice of the Customer through the Employee leverages the knowledge of your customer-facing colleagues.

PROS

- Easy way to get fast feedback

- Good way to get employees engaged and involved

- Excellent source of knowledge and insight

- Can provide a measure of employee commitment

CAUTIONS:

- Be aware of employees may be skeptical

- Be aware of any inaccuracies

- Be prepared that employees can use it as a sounding board

Company Metrics

Metrics such as financial metrics and operational metrics can add depth and clarity to customer insights.

PROS

- Leverage information that already exists
- Helps secure executive buy-in and support
- Brings context to other sources of customer insight
- Can be instrumental in proving ROI

CAUTIONS:

- Interpret metrics correctly
- Find a way to tie metrics to customer sentiment
- Be aware it is tough to get metrics

Predictive Analytics

Predictive analytics help you look ahead an anticipate customer issues.

PROS

- Provides specific guidance for decisions
- Doesn't require survey feedback
- Creates new information about customers
- An effective way to prevent future issues

CAUTIONS:

- Have access to the special skills required
- Have the right data
- Be aware that it is could create scrutiny

Text Analytics

Text analytics helps make sense of unstructured customer feedback.

PROS

- Brings structure to qualitative input

- Great for social media and open-end comments

- Can spot issues and problems to fix

- Helps determine customer sentiment

CAUTIONS:

- Be aware that it is time consuming and not as easy
  as it sounds

- Constantly manage and fine tune

Some things need to stop:

- Overdependence on surveys

- Repetitive relationship surveys

- Gaming participation

- Asking too much

- Always seeking a census

Recommendations

- Use relationship surveys sparingly

- Use pulse surveys and transaction surveys to target key areas of focus

- Use an adaptive design – different questions for different people

- Leverage existing internal data to target surveys better

- Reduce volume through sample optimization and predictive analytics

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