

FOR GOOD MEASURE

Rob Brickle outlines best practice in customer measurement.



Rob Brickle: segment your customers into types or categories

Many businesses pride themselves on measuring customer satisfaction, and put significant time and resource into gathering feedback on their performance. But what do they actually do with the data?

Returning to business-as-usual with a tick in the 'customer feedback' box is just not good enough. Companies should be conducting deep analysis of the results, and re-engineering the business processes that could improve their customers' experience, loyalty and ultimately their own bottom line.

You can ensure your customer measurement is meaningful by following these five steps:

● **Step 1. Build a business case for the project and get a senior owner.**

You're far more likely to get buy-in and enthusiasm from people at all levels if they can quickly understand where you are coming from, and can see the potential benefits.

So make it real for them. Build a compelling business case that explains exactly what you hope to achieve from measuring customer feedback, and give it to them in facts and figures – eg, what it will mean for your bottom line and their pockets if you can retain more clients and improve customer experience and loyalty.

Again, few change programmes are successful without a senior owner. If you haven't got one for this project, find one quickly.

A senior owner needs to be truly accountable for the initiative, rather than just providing sage advice. To ensure full ownership you'll need to find someone who has a vested interest in the success of the activity, so they remain engaged and determined that the project will succeed from start to finish.

The owner also has to have sufficient seniority to remove barriers for you when they arise, and the time and interest to understand any issues that might arise.

● **Step 2. Identify what you need to know and who is best placed to supply the information.**

Typically businesses want to know how they are performing and if there are any areas for improvement so they can boost their customers' experiences. So, the types of questions to ask are: what do customers think of our product/service? What is it like to do business with us? What do customers have to do to use our product? Are there any gaps in our offering?

Segment your customers into types or categories to make better sense of differing needs and areas of the business, and be clear about the value of interviewing a specific customer. Your focus should be on those customers who provide greatest value to the business now and for the future, not the non-strategic ones.

Remember, it is perfectly normal to interview more than one individual in the customer organisation in order to properly represent the profile of the relationship with that customer. Also, it's usually better to interview a broader number of contacts in fewer customers than a small number of contacts in many customers – it gives you a better overall view of what people really think.

● **Step 3. Decide when, where and how to gather the data.**

A hybrid approach is generally the most effective and involves a combination of the typical survey ratings seen in traditional approaches to satisfaction, and the depth and richness of information resulting from interviews.

Use your own people to conduct face-to-face reviews. Whilst this may at first seem counter-intuitive, in practice the potential problems of bias rarely occur. Those with an intimate knowledge of the working relationship are much better placed to probe for and interpret the relevant information. As a beneficial side-effect they will also have bought in to the process and results and have a vested interest in taking the resultant improvement actions.

But be warned, these reviewers need preparing! Training should be carried out as close as possible to the interviews so the skills learnt are fresh in the mind.

● **Step 4. Communicate, communicate, communicate!**

It is important to communicate well when a project like this is taking place. Good, clear and regular communications create a 'drum beat' around how you are progressing, and will help both your internal and client teams buy into and understand your objectives and, most importantly, persuade them to give you their valuable time and attention when you need it.

Don't make the mistake of leaving your communications until the last minute, or assuming it's a lightweight aside that can be done on an *ad-hoc* basis. A good formal communications plan will need to be in place from the start of the project to ensure both customers and internal colleagues stay fully involved.

● **Step 5. Analyse the results and action necessary changes.**

At this stage you are looking to translate what the customer has actually fed back to you into a set of deliverables.

Once you have analysed what the customer has reported, you should arrange a debriefing session with key stakeholders where you translate your analysis into actions for change at an individual, customer-organisation and divisional level. These changes need to be correlated with any other improvement plans that may already be in place.

You then need to track the completion of actions to ensure success. After all, visible changes and improvement are what will prove to your internal team and customers that they have been part of a worthwhile, business-enhancing activity.

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