



CAPTURING THE *CUSTOMER* EXPERIENCE



Customer Service Intelligence

Enabling Customer Experience Quality
Control for 30 years



Customer Service Quality

- ✓ High quality customer service is increasingly a key ingredient in acquiring and retaining customers.
- ✓ Only 4% of dissatisfied customers will typically complain.
- ✓ Customer Retention is Valuable:
 - The probability of selling to an existing customer is 60-70% vs 5-20% probability of selling to a new prospect.
- ✓ A typical customer will spend 67% more during months 30-36 of their relationship than in months 0-6.



Customer Retention Challenge



- ✓ An average American business loses 15% of its customers annually
 - 70% of customer losses typically due to poor customer service (Poor service causes 10 of every 15 customers lost)



- ✓ Let's look at the value of a Customer...
NOT a transaction
 - Value of Customer at an average sale of \$16,000 x 10 years = **\$160,000**
 - 10 lost customers x \$160,000 = **\$1,600,000.**



- ✓ What is your company's risk exposure?
- ✓ **\$1,600,000 AT RISK EVERY YEAR** if customer service quality is poor

CSI helps with QUALITY CONTROL through quick, focused customer feedback that enables you to:

- ✓ Monitor service quality FROM THE EYES OF YOUR CUSTOMER to identify the source of any problems
- ✓ Capture Golden Nuggets of opportunity from Customer Suggestions
- ✓ Learn which employees are providing exceptional service (and which are not)

Great Customer Service drives Customer Retention

- ✓ A five percent increase in customer retention can lead to an increase in profits between 25% and 95%



- ✓ **Can you afford not to invest in Customer Service Quality Control?**
- ✓ **CSI has programs geared toward your industry**
 - ✓ Service Follow Up
 - ✓ Sales Delivery Follow Up
 - ✓ Prospect Follow Up
 - ✓ Retail Show Follow Up
 - ✓ Rentals
 - ✓ 6 Month Follow-up
 - ✓ Storage
 - ✓ Slip holders
- ✓ **Any reason why you shouldn't give our program a try?**



How Do We Do This?

- ✓ In the following slides we will review the tools we've developed to help our customers manage service quality, which is one of the Key Drivers to a healthy and profitable business.
- ✓ CSI works with each customer to ensure an appropriate fit with management's objectives and KPIs.



Overview of CSI Process

Your Step

Dealer Input

Report Customer
& Unit Information
to CSI

CSI Imports

CSI Imports

Names are
imported into CSI
Callware Program

The Phone Call

- Friendly, Professional CSR greets customer on your behalf
- 1-5 questions asked
- Courtesy Message left on 1st attempt and final attempt
- 6 attempts made
- Text or email survey sent on final attempt-branded with your logo and company name

Monthly Reports

Status of all
customers

Employee
Performance

Report Trends

Your Part

Follow up with Hot
Sheet Customers

Praise staff for job
well done

Daily Alerts

HOTSHEET Reports
are High Priority or
Informational

WOW Reports are
Praising staff
comments

Customer Feedback

Call information is documented on a Customer
Report Card

HOTSHEET & WOW emailed twice daily

Monthly Recap Reporting

Customer Report Cards

Sent up to twice daily, when applicable.

HOT SHEETS: This can be a high priority request or simply informational.

**HOT
SHEET**

WOW Alerts: Praise or commentary about a specific employee, when mentioned by name by your customer.


**WOW
ALERT**

Non-Alert CRC's: Sent monthly

**Non - Alert
CRC's**

What is a **HOT SHEET**?

- ✓ Anything that needs IMMEDIATE attention/action.
- ✓ Companies lose 70% of customers due to poor customer service.
- ✓ 68% of customers will leave you because they feel you are indifferent to them.
- ✓ What are you currently doing to retain would-be lost customers?

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 1-800-TELLCSI (835-5274)
 www.tellcsi.com


| CUSTOMER REPORT CARD - December 2016 | | | | | | |
|---|--------------|--------------|---------------|---------|------------|--|
| CLIENT: Heavens Marine | | | | | | |
| PROGRAM: Service Follow Up | | | | | | |
| CALL / CONTACT DATES: 12/1/2016 - 12/1/2016 | | | | | | |
| REPORT DATE: 12/29/16 | | | | | | |
| Call Completed: 12/1/16 12:01 pm | | | | | | |
| CUSTOMER NAME | DAY Phone | MOBILE Phone | EVENING Phone | TRAN ID | TRAN DATE | |
| 2045447 FRED WALLIS | 414-555-1212 | - | - | | 11/29/2016 | |
| TECHNICIAN | MODEL | REFERRAL | | | | |
| Ken Tobin: Technician | | | | | | |
| HOT SHEET | | | | | | |
| Tone: Somewhat dissatisfied about the following: | | | | | | |
| Plan of Action: For Your Information | | | | | | |
| Q01: Was everything done to your satisfaction? Yes: "It's all fixed and working good." | | | | | | |
| Q02: Were you satisfied with the treatment by the personnel? No: "At first we had a lot of problems but it got better. We had made an appointment, and we took it in and told them we needed it back by the 19th. It sat there for two weeks and didn't get touched. The second guy we talked to was very apologetic, and they overnighted the parts. I had to get it on Monday instead of Saturday. It created other problems, but they ended up getting it done. Luckily, it didn't get too cold because it wasn't winterized yet. They set the order to get the shade that we wanted, but when they found it and ordered it they got the wrong one. I'm not sure if that was them or the manufacturer. It still hasn't come in as far as I know, but it's been almost two weeks and we haven't heard anything. We sent a lot of people there because we are part of a club, but after this fiasco I wonder if we should." | | | | | | |
| Q03: Would you do business again with the service department? Yes: "I hear some horror stories from the places in town, too. I probably will, just because it's a necessity. There are some things that can't get fixed on by the smaller local mechanics, and you need to take it back to the dealer." | | | | | | |
| Q04: Any suggestions on how the service department could improve? "Well, they just need better communication. If a camper comes in don't let it just sit a week. For me they just need to improve their timely manner of getting the camper in, and communicating with the customer. If we hadn't called they probably wouldn't have touched it. They dropped the ball. That's something they'll have to improve themselves internally. I'm not sure of the solution because I don't really know their business. Things get better to the end, so I'll give them another chance to follow through. They need to know so they can improve." | | | | | | |
| CUSTOMER SUGGESTIONS COMMUNICATION CUSTOMER TREATMENT ON TIME EFFICIENCY PARTS AVAILABILITY | | | | | | |

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What is a **WOW**?

- ✓ One industry study showed that the #1 complaint amongst staff members was “Not Enough Focus on the Positive & Too Much Focus on the Negative.”
- ✓ Other than annual raises, etc – how does your company identify staff members who perform exceptionally well? How do you practice regularly giving praise to employees for exceptional service or work?

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| CUSTOMER REPORT CARD - November 2016 | | | | | | |
|---|------------------|-----------|-------------------------|---------------|----------|------------|
| CLIENT: Joe Schmoee RV and Marine | | | | | | |
| PROGRAM: 0856B Sales Delivery | | | | | | |
| CALL / CONTACT DATES: 11/1/2016 - 11/30/2016 | | | | | | |
| CLIENT TRANSACTIONS DATES: 10/21/16 - 11/22/16 | | | | | | |
| REPORT DATE: 12/1/16 | | | | | | |
| Call Completed: 11/9/16 8:16 pm | | | | | | |
| CUSTOMER # | NAME | DAY Phone | MOBILE Phone | EVENING Phone | TRAN ID | TRAN DATE |
| 112286 | OPPOKAZ, JIM MRS | - | - | 847-954-897 | | 10/29/2016 |
| EMPLOYEES | | | | | REFERRAL | |
| | | | GRAND DESIGN REFLECTION | | | |
| | | | 279L 2017 | | | |
| WOW They were really great to work with, especially Nick. Charlie and Joe were great, too! | | | | | | |
| Did SP contact you with courtesy and concern? | | | | | | |
| Yes: "Nick is great." | | | | | | |
| Q02: Was your unit prepared to your satisfaction at the time of delivery? | | | | | | |
| Yes | | | | | | |
| Q03: Satisfied with explanation of features, operation and maintenance? | | | | | | |
| Yes | | | | | | |
| Q04: Who or what prompted you to visit Joe Schmoee? | | | | | | |
| Repeat Customer: "We had bought an RV there before." | | | | | | |
| Q05: How likely is it that you would recommend Joe Schmoee RV & Marine? | | | | | | |
| 10 - Definitely would | | | | | | |
| Q06: What have they done to earn that rating? | | | | | | |
| "They were really great to work with, especially Nick. Charlie and Joe were great, too!" | | | | | | |
| Q07: Did SP contact to make sure everything is ok/referrals | | | | | | |
| Yes: "No, I dont have anyone at the time." | | | | | | |

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Monthly Management Reports

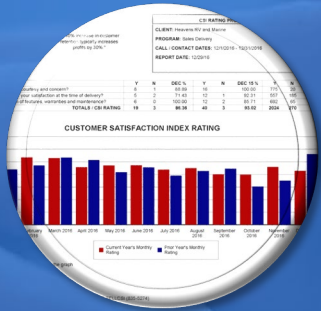
(Measure)

We have all the tools you need to organize and track your customer data



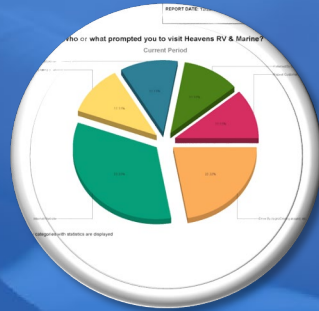
Monthly Management Reports

(Measure)



CSI Rating

Track your Customer Satisfaction Index.



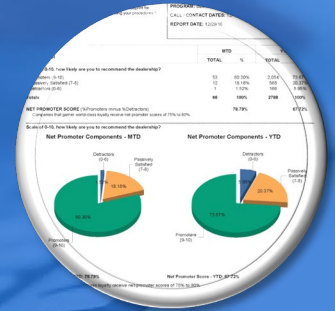
Suggestion Summary

What's missing?
Gain insights from customer suggestions.



EPR

Employee Performance Report - used to manage your staff as well as ingrain Service Quality into company culture.



NPS

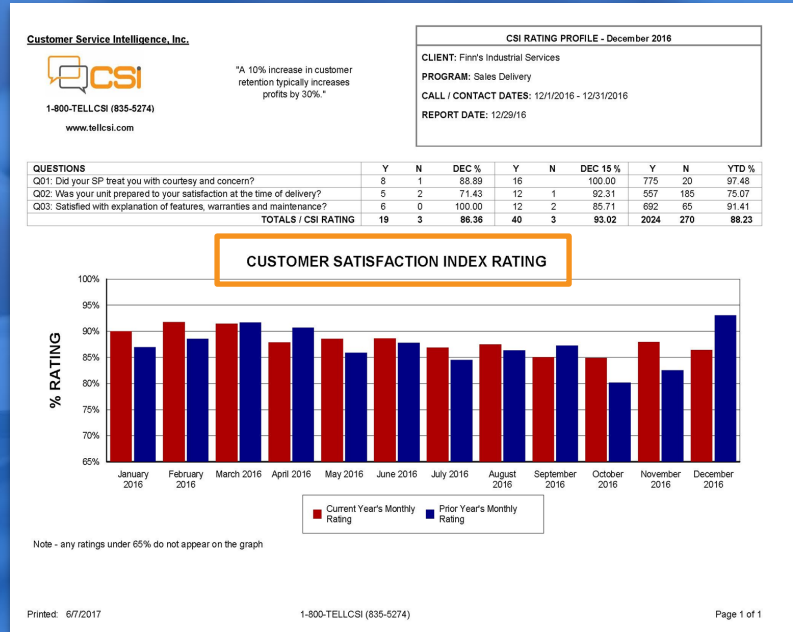
Empowers you to make more promoters within your customer base.

Customer Satisfaction Index

✓ 81% of satisfied customers are more likely to do business with you again if they have a positive experience.

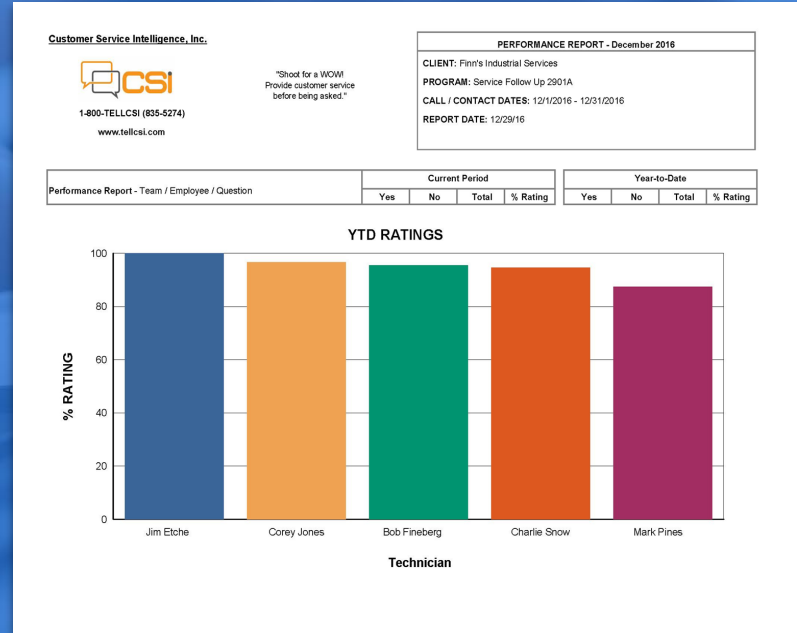
✓ Do you know what your CSI Rating may be?

81%



Employee Performance

- ✓ Companies with happy employees outperform the competition by 20%
- ✓ Happy employees experience 31% higher productivity
- ✓ Happy employees are 19% more accurate at their tasks



WOW Report

- ✓ Only 42% of employees are happy with the rewards and recognition that their companies offer.
- ✓ Do you have a weekly/monthly team meeting in each department? This would be a great time to recognize those individuals in front of the team.



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WOW REPORT

WOW Report - May 2017

CLIENT: City Textile
PROGRAM: 9972A Service
REPORT DATE: 5/29/17

Call Completed: 5/26/17 8:26 am

| CUST# | NAME | DAY Phone | MOBILE Phone | EVENING Phone | TRAN ID | TRAN DATE |
|---------|----------------|-------------|--------------|---------------|---------|-----------|
| 1135973 | Edwards, Peter | 847-5544800 | - | - | 940695 | 5/29/2017 |

WOW They do an outstanding job.

Call Completed: 5/26/17 8:22 am

| CUST# | NAME | DAY Phone | MOBILE Phone | EVENING Phone | TRAN ID | TRAN DATE |
|---------|-----------------|-------------|--------------|---------------|---------|-----------|
| 1135946 | Tolker, Michael | 847-5551393 | - | - | 940686 | 5/29/2017 |

Creeron MILITARY COLLEGE 11487

WOW They're excellent. They have excellent customer service when they come in. They're polite and know when not to interrupt. They're professional.

Call Completed: 5/16/17 12:16 pm

| CUST# | NAME | DAY Phone | MOBILE Phone | EVENING Phone | TRAN ID | TRAN DATE |
|---------|--------------------|-------------|--------------|---------------|---------|-----------|
| 1135960 | Cogod, Dennis Mrs. | 847-5551401 | - | - | 940637 | 5/29/2017 |

Folwell AUTOMOTIVE 9072

WOW Maurice is great, he does a great job.

Call Completed: 5/2/17 12:57 pm

| CUST# | NAME | DAY Phone | MOBILE Phone | EVENING Phone | TRAN ID | TRAN DATE |
|---------|-------------|-------------|--------------|---------------|---------|-----------|
| 1135963 | Dixon, Lisa | 847-5559648 | - | - | 940449 | 7/2/2017 |

Frank WIRE & CABLE 11201

WOW We've been very pleased with them. Maurice is fabulous.

Call Completed: 5/23/17 11:21 am

| CUST# | NAME | DAY Phone | MOBILE Phone | EVENING Phone | TRAN ID | TRAN DATE |
|---------|------------------|-------------|--------------|---------------|---------|-----------|
| 1135966 | Campbell, Jackie | 847-5556856 | - | - | 940644 | 5/29/2017 |

Fuller DEPARTMENT OF VEHICLE SAFETY 62-11078

WOW He's always here on time, delivers great service, and has a great attitude. They take care of us, and I appreciate it.

Call Completed: 5/22/17 2:30 pm

| CUST# | NAME | DAY Phone | MOBILE Phone | EVENING Phone | TRAN ID | TRAN DATE |
|---------|-------------------------|-------------|--------------|---------------|---------|-----------|
| 1135964 | Zimmerer, Jennifer Mrs. | 847-5557115 | - | - | 940658 | 5/29/2017 |

Kensling @ 9959

WOW Mr. Alex who comes for the deliveries does a great job.

Suggestion Summary

✓ Globally, 54% of all consumers say that they have higher customer service expectations than they did just one year ago.



✓ What do you think your biggest issue/pain is with your company, when it comes to the customer experience?

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"Customer comments make a wonderful blueprint for remodeling your procedures."

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SUGGESTION SUMMARY REPORT - December 2008

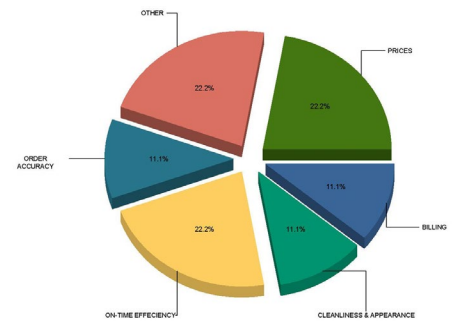
CLIENT: Superior Mat Services

PROGRAM: 9400A

REPORT DATE: 12/31/17

| CATEGORIES - Criteria Based on: | | CURR | % | YTD | % |
|---------------------------------|--|------|-------|-----|-------|
| 1 | ORDER ACCURACY deliver correct mats, dust mops, be sure order is complete, etc. | 1 | 11.1% | 20 | 15.2% |
| 2 | ON-TIME EFFECENCY deliver on or time, show up when you say you will, respond quicker, etc. | 2 | 22.2% | 10 | 7.6% |
| 3 | COMMUNICATION better communication regarding delivery, more communication from rep, return calls, etc. | 0 | - % | 14 | 10.6% |
| 4 | CUSTOMER TREATMENT better customer service, treat customers better, listen to customer, etc. | 0 | - % | 9 | 6.8% |
| 5 | RESPONSE TO REQUESTS/PROBLEMS respond quicker to requests and problems, etc. | 0 | - % | 10 | 7.6% |
| 6 | CLEANLINESS & APPEARANCE get mats cleaner, remove stains, etc. | 1 | 11.1% | 12 | 9.1% |

SUGGESTIONS / COMPLAINTS % - December 2017



Net Promoter Score (NPS)

✓ *With Social Media taking over, people can now press a button and tell hundreds or thousands of people about a bad experience in an instant.*



✓ Referral leads convert 30% better than leads generated from other marketing channels and have a 16% higher lifetime value.

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"Customer comments make a wonderful blueprint for remodeling your procedures."

NET PROMOTER SCORING - August 2017

CLIENT: ABC Software
PROGRAM: Non-Garment Account Follow Up 9408N
CALL / CONTACT DATES: 8/1/17 - 08/28/18
REPORT DATE: 9/29/17

| QUESTION ANSWER | MTD | | YTD | |
|-----------------|-------|---|-------|---|
| | TOTAL | % | TOTAL | % |

Scale of 0-10, how likely are you to recommend Finin's?

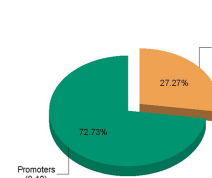
| | | | | |
|---------------------------|-----------|-------------|-----------|-------------|
| Promoters (9-10) | 8 | 72.73% | 81 | 89.01% |
| Passively Satisfied (7-8) | 3 | 27.27% | 10 | 10.99% |
| Detractors (0-6) | 0 | 0.00% | 0 | 0.00% |
| Totals | 11 | 100% | 91 | 100% |

NET PROMOTER SCORE (%Promoters minus %Detractors)

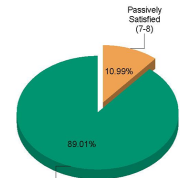
Companies that game: world-class loyalty receive net-promoter scores of 75% to 80%.

Scale of 0-10, how likely are you to recommend Finin's?

Net Promoter Components - MTD



Net Promoter Components - YTD



Net Promoter Score - MTD: 72.73%


Companies that game: world-class loyalty receive net-promoter scores of 75% to 80%.

Net Promoter Score - YTD: 89.01%

Call Report Summary

- ✓ *CSI will capture 50-80% contact ratios by phone.*
- ✓ *Displays any customer we were unable to contact after 6 attempts and gives the reason WHY we were unable to reach them.*
- ✓ *CSI Clients can resubmit corrected records to be recalled at no charge.*

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*If you have submitted a phone number wrong, you may re-submit it!

CALL TALLY & NON-CONTACT REPORT - May 2017

CLIENT: City Textile
PROGRAM: Service 9972A
REPORT DATE: 5/29/17

| CALL RESULT TALLY | | | WEB SURVEYS SUBMITTED | | |
|------------------------------|--------------|---------------|-------------------------|----------|---------------|
| | # of Records | % of Total | | # Sent | % of Total |
| Total Contacted: | 31 | 65.96 | Wrong #'s: | 0 | 0.00 |
| Wrong #'s: | 0 | 0.00 | Party Not Available: | 0 | 0.00 |
| Duplicate Entry: | 0 | 0.00 | PR Messages: | 0 | 0.00 |
| Did Not Wish to Participate: | 0 | 0.00 | Language Barrier: | 0 | 0.00 |
| Party Not Available: | 4 | 8.51 | Web Surveys Requested: | 0 | 0.00 |
| PR Messages: | 12 | 29.53 | iCampaigns: | 0 | 0.00 |
| Web Surveys Completed: | 0 | 0.00 | Total Submitted: | 0 | 100.00 |
| Web Surveys Requested: | 0 | 0.00 | Web Surveys Completed: | 0 | |
| Language Barrier: | 0 | 0.00 | Surveys % Completed: | 0 | |
| Total Completed: | 47 | 100.00 | | | |

Hot Sheets: 1 WOW's: 6 Referrals: 0

| CUST# | DESCRIPTION | EMPLOYEES | Day Phone | TRAH |
|---|-------------|---------------------------------|---------------|-------------------|
| | | | Evening Phone | TRAN DATE |
| 1135947 | | HARRY FULLER : TEAM_3 | (847)5553777 | 940446 7/20/17 |
| BREWSTER, GERALD Under Medical Center | | | | |
| RESULT: CSR left a public relations message Attempted Contact: 5/1/2017 8:30:07AM COMMENT: | | | | |
| 1135978 | | LOWELL SUSAN NELSON : TEAM_3 | (847)5558000 | 940861 5/29/15 |
| DELUCA, GERALD TICKET HEALTHCARE / ATLANTA | | | | |
| RESULT: Cancel - party not available Attempted Contact: 5/26/2017 8:40:04AM COMMENT: Rangs on file attempt. Unable to leave PR | | | | |
| 1135958 | | MICHAEL UNGER : TEAM_3 | (847)5553363 | 940856 5/29/15 |
| DELUCA, STEVE Francisco REGIONAL | | | | |
| RESULT: CSR left a public relations message Attempted Contact: 5/25/2017 10:13:15AM COMMENT: | | | | |

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The CSI Difference

(Manage)

Fitting all the pieces together

Once you have the customer intelligence and the reports that are measuring your staff and internal processes, you can more effectively and efficiently manage your business and even influence its culture – all based on actual data.



Customer Service Intelligence, Inc.

1-800-TELLECS (855-8274)
www.tellect.com

Client: **Customer Service Intelligence, Inc.**

Report Date: 12/31/16

NET PROMOTER SCORE (NPS)

Net Promoter Score: **76%**

Net Promoter Score (NPS) is a metric for customer loyalty, based on the probability that a customer will recommend your company to others.

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1-800-TELLECS (855-8274)
www.tellect.com

Client: **Parix Industrial Services**

Report Date: 12/31/16

PERFORMANCE REPORT - YTD

Program: **Service Follow Up 2016**

Call Contact Dates: 12/15/16 - 12/31/16

| QUESTION | Y | N | DEC % | Y | N | DEC % | Y | N | YTD % |
|---|-----------|----------|--------------|-----------|----------|--------------|------------|------------|--------------|
| Q01: How good is your product/service? | 8 | 1 | 88.89 | 16 | 100 | 100 | 775 | 20 | 87.46 |
| Q02: Was your unit prepared to your satisfaction at the time of delivery? | 5 | 2 | 71.43 | 12 | 1 | 92.31 | 557 | 100 | 75.57 |
| Q03: Satisfied with explanation of features, warranties and maintenance? | 6 | 0 | 100.00 | 12 | 2 | 85.71 | 662 | 95 | 89.41 |
| TOTALS & CSI RATING | 19 | 3 | 86.38 | 40 | 3 | 92.52 | 204 | 270 | 88.33 |

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1-800-TELLECS (855-8274)
www.tellect.com

Client: **Parix Industrial Services**

Report Date: 12/31/16

PERFORMANCE REPORT - YTD

Program: **Service Follow Up 2016**

Call Contact Dates: 12/15/16 - 12/31/16

YTD RATINGS

| Technician | Y Rating | N Rating |
|---------------|----------|----------|
| Jim Eltze | 100% | 0% |
| Corey Jones | 100% | 0% |
| Bob Friesberg | 100% | 0% |
| Charlie Snow | 100% | 0% |

You can use the CSI Dashboard to:

- ✓ *Input new customers for CSI to call*
- ✓ *Track and resolve HOT SHEETS*
- ✓ *View all live data from your CSI Program(s)*
- ✓ *Drill down and dive DEEP into your CSI data*
- ✓ *...and more!!!*



- ✓ *Don't view customers as a simple transaction, but as LIFE-LONG VALUABLE CUSTOMERS*
- ✓ *Loyal customers generate terrific word-of-mouth advertising and powerful referrals*
- ✓ *Every customer touch-point presents a gift of opportunity*
- ✓ *Assure the stories your customers tell about those touch-points are what you want prospects to hear*
- ✓ *Referrals are earned by exceptional service*
- ✓ *Exceptional service produces life-long customers*
- ✓ *Life-long customers are your lifeline to a more profitable business*
- ✓ *CSI is your Partner to TAKE CONTROL OF CUSTOMER EXPERIENCE QUALITY*



CAPTURING THE *CUSTOMER* EXPERIENCE

We're Here to Help You Succeed
Call Us Today!

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Customer Service Quality Control Specialist

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