Increase Visibility and Reporting Effectiveness Using the Customer Engagement Framework: A Case Study

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Edgewell Personal Care

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Director Customer Experience Optimization  
IHG
Today’s Agenda

• Introductions
• SOCAP Customer Engagement Framework
• Edgewell Case Study
• IHG Case Study
Cindy Grimm
Chief CX Officer

- Leader in Customer Experience Research and Consulting for over 45 years.
- Specialize in helping clients understand their customers, and improve customer interactions
- Help clients achieve operational excellence that drives higher customer loyalty and profit
Debby Kitchell Silvestri  
Sr. Mgr. Consumer Affairs

- Established in July 2015, formerly the Personal Care division of Energizer Holdings Inc.; 25 brands in more than 50 countries.
- From baby to body, the Edgewell Family of brands has a product for everyone — with well-established brands such as:

  - Schick
  - Playtex
  - Banana Boat
  - edge
  - Personna
  - Stayfree
  - Skintimate
  - Wilkinson Sword
  - Hawaiian Tropic
  - Wet Ones
  - ob
  - Carefree

- 20 years with organization focused on Consumer Care, Quality and Compliance
Chris Zoloth  
Director, Customer Experience Optimization  

IHG®  

- Global hospitality company with 12 hotel brands and over 5,000 hotels  
  - 744,000 rooms in close to 100 countries globally  
- IHG’s vision is to become one of the great companies in the world by creating Great Hotels Guests Love  
- 25+ years with IHG  
- Lead teams that develop new or improve current agent process and the supporting training curriculum
Framework Categories

**Strategy**
- Mission/Vision/Culture
- Organization
- Strategic Long Term Planning
- Accessibility

**Process**
- Engagement Process
- Measurements
- Insights
- Partner Relations
- Crisis Management

**People**
- Hiring, Career Path and Retention
- Training
- Performance Management and Compensation
- Operations and Staffing Management
- Rewards & Recognition

**Technology**
- Telephone Engagement
- Non-Telephone Engagement
- CRM/Contact and Data Tracking
- Knowledge Management
- Mobile
- Self Service & Data Security
Is comprised of four levels at progressively higher levels of maturity:

**Transactional**
- Response handling only with limited corporate visibility
- Seen as a cost center
- Ad-hoc strategy and processes
- Operation metrics primarily efficiency based
- Basic technology and self-service
- No documented processes or SOPs

**Standardized**
- Response handling with some VOC collection
- Viewed as value-add resource
- Strategic planning done on ad-hoc basis
- Visible contact channels and online presence
- Well defined WFM and IVR technology in place – limited social
- Limited process procedure documentation

**Optimized**
- Dual role of response and VOC recognized
- Viewed as a strategic asset
- Strategic plan drives annual plan
- Highly visible contact channels including social media
- Well-defined processes and procedures documentation
- Balancing of efficiency and effectiveness
- Company-wide use of VOC
- Advanced technologies used to improve consumer experience

**Strategic Asset**
- Seen as a competitive advantage with demonstrated impact on the bottom line
- Proactive inclusion in corporate decision making
- Strong cross-functional collaboration
- Customer centricity engrained in culture
- Highly visible contact channels and proactive care activity
- Consistency across touch-points
- Seamless channel transitioning
- Integration of data across VOC and operational data, with economic impact
- Advanced technology, highly integrated
## Receive Immediate Results

<table>
<thead>
<tr>
<th>TECHNOLOGY CATEGORY OVERALL</th>
<th>OPTIMIZED</th>
<th>LEVEL</th>
<th>On average, companies scored at this level have the following characteristics</th>
<th>Opportunities to go to the next level</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Telephone Engagement</strong></td>
<td></td>
<td></td>
<td>- Basic routing and queuing</td>
<td>- Consider increasing use of queuing to provide more efficient and effective responses.</td>
</tr>
<tr>
<td>ACD, queuing, IVR and other phone related technology</td>
<td></td>
<td></td>
<td>- No workforce management technology</td>
<td>- Integrate a well-defined workforce management system</td>
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<tr>
<td></td>
<td></td>
<td>TRANSACTIONAL</td>
<td>- Expand IVR technology optimization (e.g., routing by geography, product, contact reason)</td>
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<tr>
<td><strong>Non Telephone Engagement</strong></td>
<td></td>
<td></td>
<td>- Interactive and personalized self-serve FAQs, with active monitoring and control of content by Customer Care department</td>
<td>- Include self-service mobile optimized and/or Customer Care Apps in service offering</td>
</tr>
<tr>
<td>Digital, online and mobile technologies</td>
<td>OPTIMIZED</td>
<td></td>
<td>- Basic chat and/or video chat technology available</td>
<td>- Implement technology for social media scanning and reporting</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- Technology for social media scanning, limited reporting</td>
<td>- Work toward integration of FAQs on self-service with CRM system for more seamless and efficient management</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- Technology for social media engagement on branded sites</td>
<td>- Consider increased use of chat and video chat technology</td>
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<tr>
<td><strong>CRM/Contact and Data Tracking</strong></td>
<td></td>
<td>STRATEGIC ASSET</td>
<td>- Ability to segment and reward based on loyalty and other attributes</td>
<td>- Maintain and continue to refine for efficiency</td>
</tr>
<tr>
<td>Technology used to log and track contacts and generate VOC reporting</td>
<td></td>
<td></td>
<td>- Proactive alerts based on customer issues</td>
<td>- Look for more ways to integrate CRM with other touchpoints and information sources for efficiency and effectiveness</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- Advanced BI/Analytical tools</td>
<td>- Continue to look for ways to enhance Business Intelligence and analytical tools to better understand key issues and opportunities</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- Advanced text analytics</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>- CRM integrated with all other company and distribution channel touchpoints</td>
<td></td>
</tr>
<tr>
<td><strong>Knowledge Management</strong></td>
<td></td>
<td>STRATEGIC ASSET</td>
<td>- Content pushed based on level, segment, queue, call type, location, etc.</td>
<td>- Consider tracking usage and tie to performance management and learning management system for an integrated approach to training and knowledge management</td>
</tr>
<tr>
<td>Technologies that support the information needed by front line agents for engagement and response</td>
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<td></td>
<td>- Usage is tracked and tied to annual performance expectations</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>- Repository merged with an LMS for an integrated approach to training and knowledge management</td>
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</table>
Benefits to SOCAP Members

Facilitates Strategic & Succession Planning and Supports Departmental Investments

Builds a roadmap for the future

Enables organizations to mature, develop & optimize the customer care function by identifying strengths/opportunities for improvement

Benchmark and determine your organization’s relative placement within the other customer care function
Edgewell CE Framework Background

- Sept 2015: initial CE Framework
- Quick improvements made
- July 2016: 2nd assessment
- Result: Movement along the CEF continuum

Theme of the assessment: *Improve the Customer Care group’s visibility among internal stakeholders*
2016 CE Framework Readout

Overall: Standardized

Strategies
People
Process
Technology

Closer to Optimized
Taking it One Step Further

- Engaged with CX Solutions for a deep dive
- The following was provided:
  - Consultative assessment of the Customer Care Operation
  - Internal Customer satisfaction survey designed and administered using data complied from CE Framework assessment
  - Results and recommendations
  - Follow-up to survey after changes are in place
Overall Consultative Assessment Findings

• Internal interviews closely matched self assessment
  o Viewed as an extremely approachable team
  o Those taking advantage of the data found it very useful
  o Several interviewed weren’t aware of all the Consumer Affairs (CA) team offers
  o Those interviewed showed appreciation for the CA team implementing a interview process and survey
Strategy, People and Technology

• **Strategy category**: Greatest areas of opportunity

• **People category**: Themes highlighted

• **Technology category**: Improve response time and reporting of Social Media data
Process Findings

- Lack of knowledge regarding CA’s reporting capabilities
- Reports are data heavy
- Internal partners are looking for a stronger point of view, a story, to make reporting more impactful
- CA organization reporting tools available but unknown to “internal” clients
- VOC data a requested and missing element
How, if at all, do you measure the effectiveness of your Voice of the Customer (VOC) reporting?

1. No regular measurement of the effectiveness of our VOC reporting
2. Track changes resulting from VOC reporting
3. Survey internal customers/stakeholders to assess their satisfaction with VOC reporting

https://api.cvent.com/polling/v1/api/polls/sp-n33ww8
Internal Customer Satisfaction Survey

• CX Solutions designed and implemented a customer satisfaction survey
• Survey benchmarked from a “customer” perspective the current level of internal customer awareness regarding the CA organization
• Goal was to establish a “baseline” of awareness, usage and perception of current CA data
• Online survey to 510 internal clients and stakeholders in North America in August 2016. The survey achieved a 69% response rate
Survey Key Findings

**Low Awareness of Reports and Services**
- While most are aware of Consumer Complaint reports
- Few aware of the range of contact types handled
- 6 in 10 aware of reporting and value-added services

**Engagement highest with Quality Dashboard and Targeted Questions**
- Quality and R&D depts. most aware/using reports
- Quality Dashboard and Targeted Questions to Consumers are the most know

**Most useful are Quality Dashboard, Category Review, and Targeted Questions**
- Infant Care stakeholders find reporting and services to be very useful;
- Other brands - Wet Shave (Branded), Sun Care and Skin Care - find it less useful

**Stakeholders want more communication from and collaboration with Consumer Affairs**
- Stakeholders had suggestions re more communication about reports and services,
- Request more access to reporting
- Want Consumer Affairs to be proactive and collaborative.
Improvements

- New hire and on-going training program
- CC Reward and Recognition Program
- Social Media Monitoring and Response
- Item Locator

Plans

- 3 year roadmap includes:
  - Brand reviews and increased communications
  - New department roles
  - Rebrand department
  - Promote services and activities
Process Improvements

- SOP’s, Contact Flows, Response Guidelines
- Awareness of compliance requirements with internal team and with CC
- Internal escalations process for reviewing, investigating and notifying government agencies

Process Plans

- 3 year Process roadmap includes:
  - Public surveys and focus groups
  - Standardized Product Data Sheets for future KB
  - Improve Self Service reporting for internal customers
  - Evaluate progress and determine new actions
Process Improvement Sample
Improved for Today / Plan for Tomorrow

NEW FORMAT

FEM CARE - Sport Compact Tampons
Created: 1/13/2017  Updated: 3/13/17

Photos | Features | Marketing Claims/Approach | UPC/Counts | Common Issues | FAQs | History | Date Code/Manufacturing Info | Ingredient Materials Links | Other

Sport Compact Tampons

Photos

![Playtex Sport Compact Tampons](image)

Features
- 360 Degree Protection (as all Playtex Tampons)
- Flex Fit interlocking fibers work quickly to trap fluid
- Discrete, compact form tampon
- Packed size
- Flared Finger Grip for ease of use - "Pull and Click" into place before inserting
- 50% smaller than our full size (based on length before expansion)

Marketing Claims/Approach

- Key Claims:
  - "The most compact tampon" *(length before expansion vs. leading brands)*
  - "Sport Level Protection. Unbeatable comfort" *(based on sales data for the 52 week period ending 2/17)*
  - Promote with the entire Sport Franchise (Tampons, Pads & Liners)
  - Co-promote with Entire Femcare Line (Tampons, Pads & Liners)
  - Lower List Price $3.90
  - Coupons

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<th>Sports</th>
<th>Org.</th>
<th>Menstrual</th>
<th>Linear</th>
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- Advertising: See file attached. Print attached.
- Displays (floorstands, PDQs, gravity feed)
Visibility and Reporting Effectiveness

- Work in progress / managed through competing priorities

Next Steps

- Meeting with Leadership team to finalize plans for expansion
- Launch of new Brand Review format incorporating feedback from assessment – more insights, less data
- Resend internal customer survey (July)
- Redo Framework to demonstrate success
- Re-evaluate 3 year plan.
Visibility and Reporting Effectiveness Sample: From Data Driven to Insights
SOCAP INTERNATIONAL’S
CUSTOMER ENGAGEMENT FRAMEWORK
2016 CE Framework Readout - IHG

Overall: Optimized

Strategy
People
Process
Technology
Use of Framework and Actions Taken

- December 2015 initial CE Framework completed as a benchmark
- December 2016 second assessment completed after a series of changes took place with our Loyalty Program
- Overall level stayed at Optimized
  - Took specific sub-elements to socialize with operations and other functional support teams
  - Determined actions that would support the re-launch of IHG Rewards Club
Framework Categories

Strategy
- Mission/Vision/Culture ★
- Organization
- Strategic Long Term Planning
- Accessibility

Process
- Engagement Process
- Measurements
- Insights ★
- Partner Relations
- Crisis Management

People
- Hiring, Career Path and Retention
- Training ★
- Performance Management and Compensation
- Operations and Staffing Management
- Rewards & Recognition

Technology
- Telephone Engagement
- Non-Telephone Engagement
- CRM/Contact and Data Tracking
- Knowledge Management ★
- Mobile
- Self Service & Data Security
Assessment Key Findings

**Strategy: Mission/Vision/Culture**
- Opportunity to improve relationship with Loyalty Marketing by using member reason for contact reporting from our casing system and leverage our Voice and Text analytics capabilities – Increasing our *Value Perception*

**People: Training**
- Opportunity to update our training with new/modern methods of delivery (micro e-learning) and formalized supervisory training

**Process: Insights**
- Improvements needed to our VOC survey that would drive take-rate and actionable insight (voice and text analytics)

**Technology: Knowledge Management System**
- Improvements needed to our system that would increase representative engagement and tool satisfaction
From awareness to focus to results

Mission/Vision/Culture
Training
Insights
Knowledge Management – 2017 Q2
Do you plan to complete the SOCAP Customer Engagement Framework Assessment in the next 30 days?

- Yes
- No

https://api.cvent.com/polling/v1/api/polls/sp-5xitb6
Share your insights on Twitter!

#SOCAPsymp17