



# CASE STUDY

## Customer Interface Improvement



### OPPORTUNITY STATEMENT

Our client was seeking expertise to evaluate and address how it handles its customer's experience. The objective was to formalise those processes and practices in which it excelled whilst simultaneously introducing new best practices in areas for improvement.

The company was, and still is, on a path of dynamic, sustainable growth and with that came the challenge to better serve an ever-expanding customer base. What was needed was a clear approach to the customer experience supported by lean, dynamic and standardized customer facing processes across the whole business.

### INITIAL SCOPING

Interviews were held with Key Leaders from within the business and, whilst many good practices existed, two key themes emerged. Firstly, there was a lack of formalization and consistency across the four individual Business Units.

*Ask: "What kind of journey do you want to take your customer on?"*

Secondly, a critical observation that the customer experience should start with a decision; 'What kind of journey do we want to take our customers on?' While this may not seem very important, it is one of the most important decisions we can make. It sets the tone of the whole Customer Relationship Management concept from which all the customer interfacing processes should derive.

### EXECUTION

#### Proposal Process

The existing process varied considerably across the Business Units, each often serving the same customer. This resulted in variable timelines, an approach that was 'internally' focussed and below industry standard win rates. The Sales Director had the responsibility for the whole Proposal to Signature process, but in many cases had little power as to what went to the customer.



*The Proposal process is actually the second Point-of-Sale, get this wrong and its an easy 'No'*

The Proposal needed to be part of the Sales process and the organisation needed to understand that, in their space, the customer is not selecting based on price, they are selecting based on Technical Competence. We defined an approach that engaged the customer from Day 1 of the Proposal process, that involved a defined Customer Relationship Team, including Sales, and a process drumbeat, leaving an early and lasting customer impression that the company will manage the project, both technically and from a Project Management perspective.

### **Contracting Process**

The lack of a formal and fast track process to drive and execute contracts after a successful award led to a backlog of 3 months, resulting in delayed revenue of already WON business!

The Contract is a further Point of Sale and is another opportunity to build the relationship that most competitors are not using. It is a huge issue if a Service provider is seen to delay the negotiation of a contract, that is all too common across our industry, leading to, rightly or wrongly, questions of trust.

We implemented is a Risk-based approach to Contract Management together with a negotiation process that is fast, lean and engages the Customer, with a Takt time of 3 weeks. We wanted the company to be known as the fairest and most expedient to do business with.

### **Customer Relationship Team**

There was no consistency across the business of what good customer service looked like, resulting in mixed approaches to the customers. Additionally, the order or change order process from a Customer perspective was overcomplicated and client issues were directed straight to the operational level.

### ***Dedicated Customer Relationship Teams deliver World Class levels of Customer Service***

We defined a clear statement of what good customer service means to the company, and how to organise around that. The result was the implementation of Customer Relationship teams in each business who were responsible for all the customer facing processes, from Proposal build through to project execution and KPI monitoring. This resulted in a level of consistency of customer communication never seen before, a dedicated customer team following a defined process, also freeing up the operational personnel from answering the customer ad-hoc requests.

### **Customer Governance**

Each Business Unit had its own Sales team and Sales objectives, resulting in times when the objectives of the business units are not consistent regarding a customer, or worse, the customer is confused as to who they should be communicating with.

We implemented a Customer Governance framework and process that aligned the business units with the customers and to gain access to increasingly higher-level decision makers in the customer organisation. The ethos here is to create a 'Customer for Life' by creating a culture that the whole organisation is aligned to serve their needs.

## S&OP

There were examples where an S&OP meeting was taking place, but all were unique to each particular Business Unit without a standard process or output. There was a Senior-level S&OP, but without a standard input from the Business Units, it was a mere talking shop.

Customers like to know that there is a robust S&OP process in place that reviews existing and potential business, capacities and Project risks. It really takes time for the benefits of a S&OP process to bear fruit, and this is made a lot easier by having a standard process and output regardless of business unit. We implemented a robust S&OP process with all tools and templates for ease of creating the most relevant content.

Communication infrastructure: define the processes for effective communication with customers.

All Tools and templates to support all the above

A Customer Experience Training Manual and 'Train the Trainer'

## IMPLEMENTATION

Our proposal was based on undertaking a full implementation, tested and verified for all the above

	June	July	August	September
Customer Experience concept	<ul style="list-style-type: none"> <li>Define and agree objectives</li> <li>Guiding principles</li> </ul>			
Organisation	<ul style="list-style-type: none"> <li>How and who to face the customer</li> <li>How to operate across functions</li> </ul>	<ul style="list-style-type: none"> <li>Role of the Customer Service Centre</li> </ul>		
Processes	<ul style="list-style-type: none"> <li>Plan Offer process</li> <li>Observe all other processes</li> </ul>	<ul style="list-style-type: none"> <li>Do &amp; Check Offer process</li> <li>Plan Routine Work</li> <li>Plan Contracting</li> <li>Plan Customer Governance</li> <li>Plan S&amp;OP process</li> </ul>	<ul style="list-style-type: none"> <li>Review Offer process</li> <li>Do &amp; Check Routine Work</li> <li>Do &amp; Check Contracting</li> <li>Review Contracting</li> <li>Do &amp; Check Customer Governance</li> <li>Do &amp; Check S&amp;OP process</li> </ul>	<ul style="list-style-type: none"> <li>Review Routine Work</li> <li>Review Customer Governance</li> <li>Review S&amp;OP process (ongoing)</li> </ul>
Training and Documents			<ul style="list-style-type: none"> <li>Train relevant functions in the new processes</li> </ul>	<ul style="list-style-type: none"> <li>Design and Draft Customer Experience Manual</li> </ul>

*If you would like to know more about this assignment, or indeed any of our other capabilities, please reach out to us directly.*

## DELIVERED OUTCOMES

Vision & Mission of the Customer Experience

The guiding principles and objectives behind it

KPI's to measure improvements.

An organization that knew how to face the customer and how the Customer Interface operates with the other functions.

Best Practice Customer facing processes with published guidelines and training.

