



Your entire team exemplifies a truly good business partner: professional, dedicated, passionate about their work and committed to the customer experience.”

Senior Director
Worldwide Customer Loyalty
Business Objects

RESEARCH & CONSULTING SERVICES

ENSURING YOUR SUCCESS IN ENTERPRISE FEEDBACK

To build loyalty, revenue and profits, reduce customer churn and continuously improve service quality, Global 2000 enterprises depend on CustomerSat Research & Consulting Services. As the leading provider of real-time customer and employee feedback systems for the enterprise, CustomerSat transforms your strategic goals into concrete business outcomes. Our Research & Consulting Services help you ask the right questions, get the right reports, and set up the right action programs. We work with you to continuously identify improvement opportunities in your people, systems and processes.

Since 1997, we have delivered feedback management programs using four fundamentals important to our clients:

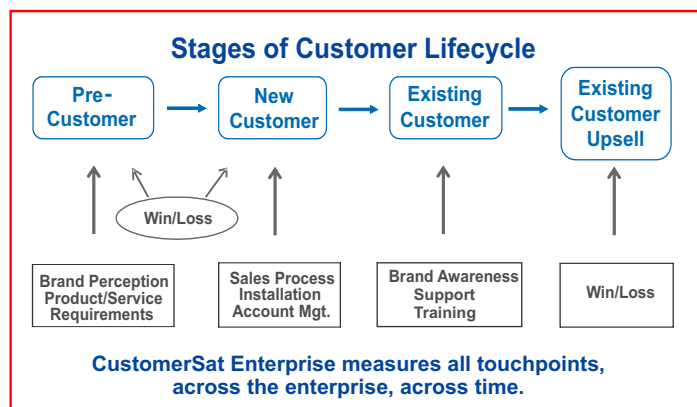
- ▶ **A trusted partner** committed to your success
- ▶ **Solutions customized to your business**, now and in the future
- ▶ **Best practices implementation**
- ▶ **Focus on action.**

YOUR TRUSTED PARTNER

CustomerSat Research & Consulting Services listen closely to understand your specific requirements and goals, then work with you to design and implement feedback systems that best reflect them. We gather feedback and deliver insights from all of your stakeholders: customers, distributors, employees, and partners. We help you measure all touchpoints, across the enterprise, across time. Our in-depth expertise in market research, project management and human behavior has been honed over hundreds of client engagements and decades of experience.

Research & Consulting Services act as a change agent, empowering your company to see what needs to be done, then facilitating it. We help you:

- ▶ **Focus on your strategic goals and objectives**, e.g., customer retention, competitive advantage, market/wallet share, financials, corporate/brand perception, employee engagement
- ▶ **Collect relevant intelligence and metrics**, e.g., customer attitudes and behavior, brand perception, willingness to recommend
- ▶ **Prioritize tactical and strategic actions**, e.g., investments, resource allocation, process changes
- ▶ **Drive business outcomes**, e.g., increased revenue, profit, market share, productivity, customer retention, reduced costs.



PROVEN METHODOLOGY, TRUSTED RESULTS

We help you measure your customers' perceptions of your products, services and brand, identify the key drivers of satisfaction and loyalty, and analyze how well your enterprise is performing. Our proven methodology includes ongoing refinements to sustain continuous improvement. Over the long term, this results in optimized business processes and achievement of your strategic objectives.

By creating results-oriented feedback programs that are customized for your organization, our Research & Consulting Services experts increase your effectiveness and ensure a rapid return on investment.

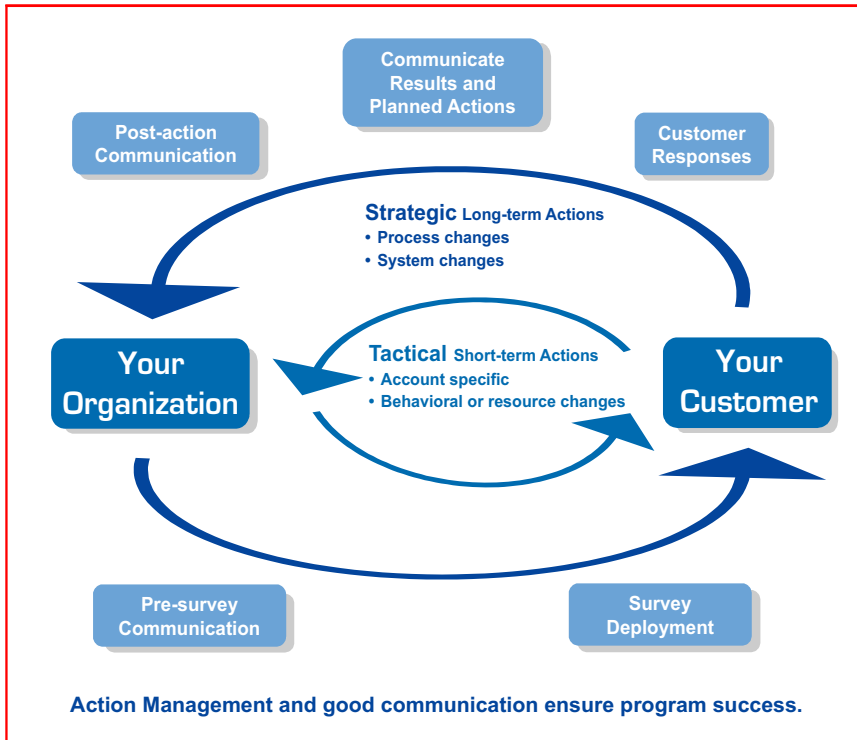
Our methodology includes these proven steps:



1. Discovery	Analyze your organization within its industry. Examine processes. Uncover customer pain points. Determine key stakeholders, conduct interviews and focus groups. Define objectives. Establish overall feedback strategy, including rollout plan to match resources. Choose feedback channels (IVR, phone) and develop sampling strategy to ensure reach. Integrate existing feedback programs. Develop communication plan to optimize participation.
2. Survey Design	Develop questionnaires. Manage translations for global surveys. Define sampling rules to ensure valid representation of all customer segments. Design survey invitations and reminders. Establish templates for Action Management. Define teams, severity levels and follow-up process.
3. Survey Deployment	Test and deploy questionnaires, generate Action Alerts and open cases. Set up push reports to send key analytics to designated individuals on an ongoing basis.
4. Ongoing Project Management	Monitor results enterprise-wide. Provide status reports. Explain results and their implications. Answer questions and provide training for all users.
5. Analytics & Reporting	Identify and rank drivers of satisfaction and loyalty. Track key metrics over time by customer segment. Analyze using quad charts, trend lines, significance testing, gap and verbatim analysis. Deliver findings, conclusions, and recommendations via executive-level reports. Over time, refine a loyalty index based on your strategic objectives.
6. Recommendations/Prioritized Actions	Use Action Management and alerts to drive immediate follow-up action. Recommend improvements that may include people (e.g., hiring criteria, training); processes (e.g., escalation, sales follow-up); and systems (e.g., knowledge bases for support reps and self-serve customers) based on survey results, core competencies, costs and competition.
7. Revise/Refine	During periodic reviews, refine questionnaire; revise the sampling plan based on responses by segment; refine analysis by region, product, and customer segment; and review action process templates.

DRIVING INFORMED TACTICAL AND STRATEGIC ACTIONS

CustomerSat Research & Consulting Services help you **act** on customer feedback.



Tactical Actions: CustomerSat Enterprise Action Management™ lets us design alerts and case management to ensure that dissatisfied customers get immediate attention from the right individuals and teams. We help you determine what the trigger questions and scores should be, identify problem categories and severity levels, establish deadlines, and set up business rules that assign individuals or teams to cases. Action Management helps you keep a finger on the pulse of your customers, while holding individuals and groups accountable for responsive action.

Strategic Actions: CustomerSat professionals guide you to take strategic actions that drive broader, longer-term business process

improvements and system changes. We:

- ▶ Identify key drivers of satisfaction and loyalty by product, region, or channel
- ▶ Help you prioritize actions that drive performance, based on impact on satisfaction, alignment with goals, expected ROI, competitors' actions, and profitability of targeted customer segments
- ▶ Assess your competitive positioning
- ▶ Measure the impact of satisfaction and loyalty improvements on revenues and profits
- ▶ Scorecard customers to pinpoint those at greatest risk or with the highest potential for additional purchases.

GUIDING ESSENTIAL COMMUNICATIONS

Our experts help you design, schedule, and manage comprehensive employee and customer communications, both pre- and post-survey, to engage all stakeholders and optimize participation. For a customer relationship survey, for example, we may recommend a three-stage communication plan that reflects best practices:

- 1) **Pre-survey:** Build awareness, convey the purpose and importance of your feedback programs among employees and customers.
- 2) **Post-survey:** Immediately share the results with employees and thank respondents, describing results and actions to be taken.
- 3) **After actions are implemented:** Spread the word to ensure that customers recognize and experience those changes.

In short, CustomerSat professionals bring skills and experience that maximize the impact of your feedback programs.

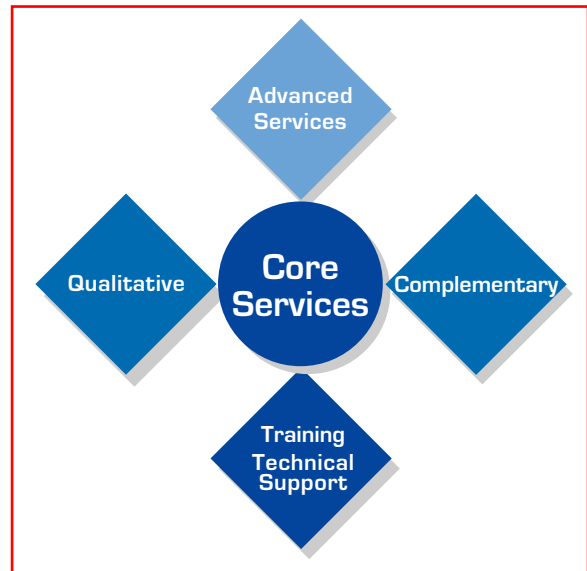
“CustomerSat’s expertise helped our cross-functional team implement a truly successful customer feedback program which supports our process improvement efforts.”

Vice President
Thermo Fisher Scientific

A FULL RANGE OF SERVICES, CUSTOMIZED SOLUTIONS

Core Survey Programs address all touchpoints of all stakeholders throughout the customer lifecycle.

- ▶ **Pre-Customers:** Quality and prioritize sales prospects, speed lead qualification.
- ▶ **New Customers:** Identify key factors in the purchase decision, get feedback on the sales process, gauge implementation satisfaction.
- ▶ **Existing Customers (Relationship):** Assess ongoing relationship, identify and understand customer segments, compare to competitors, assess brand image.
- ▶ **Existing Customers (Transactions):** Confirm timely problem resolution, gauge support representative effectiveness, track training quality, identify product issues, prioritize new features.
- ▶ **Former Customers:** Identify churn patterns and causes, learn where they went and why.
- ▶ **Employees:** Learn what motivates and de-motivates employees, identify key drivers of employee retention and commitment.
- ▶ **Partners:** Probe satisfaction with products, marketing, service and support. Assess partnership health, including strategic, relationship, and operational fit.



Research & Consulting Services provide all the services your program requires.

Qualitative Services include focus groups, verbatim analytics, and interviews with customers, staff, and management to pinpoint follow-on actions by stakeholder segment.

Complementary Services: CustomerSat **Benchmark Services** let you compare your performance with similar organizations, determine external standards of excellence, recognize and leverage strategic advantages, anticipate customer requirements, and identify potential vulnerabilities. Our **ACE Audit and Certification** program provides an objective third-party audit of your feedback systems, including detailed recommendations for improvement.

Advanced Services: Quantitative programs include customer value analysis (CVA) to assess competitive positioning, employee-customer linkages to prioritize and cost-justify investments in service climate, customer segmentation analysis, loyalty indexing, factor and regression analysis, and revenue modeling.

“What do I like best? Great actionable data, getting to the root cause of issues and being able to act on it and see improvement.”

Director
Customer Care, AIG

RESEARCH & CONSULTING SERVICES: YOUR COMMITTED PARTNER

As your trusted partner, we listen to your requirements, understand your goals, and collaborate with you to tailor the feedback programs that best achieve them. We continuously fine-tune your programs to track your business as it evolves. Every CustomerSat solution is extensible, by survey type, stakeholder, touchpoint, event, element, and feedback channel. It's a wise, long-term investment with a demonstrable ROI. Ask us for details.



ABOUT CUSTOMERSAT

Since 1997, CustomerSat's feedback solutions have helped companies such as AIG, AMD, Ariba, Business Objects, Canon, Thermo Fisher Scientific and Wells Fargo take timely action to increase customer satisfaction and loyalty, and enhance corporate profitability.

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