

White Paper:

# Driving Customer Experience Quality from the Front Line

## Part 2 - Implementation Considerations



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A well-managed Service Management Organization (SMO) clearly understands its clients and works with them to implement a quality customer experience. Many organizations rely on the SMO to manage customer requests for their products and services. Through the implementation of a Customer Quality Environment (CQE), the SMO sets customer experience standards for internal business groups and manages customer expectations while increasing customer satisfaction and creating communication efficiencies throughout an organization.

Many areas of a company need to come together in order to create an effective CQE, as illustrated in the diagram below.

Certain guiding principles of customer satisfaction drive the SMO, and specific knowledge is required to enhance the current environment. There needs to be a starting point to build alignment throughout the organization, and the optimum levels of customer satisfaction can be achieved through the creation of the CQE.

To deliver maximum value to your clients, a three-step process will help frame the implementation of the CQE.

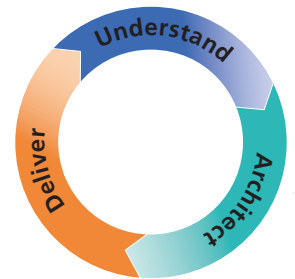
### 1. Understand and Align

Start with understanding the current environment including how communication is handled throughout the organization. A clear understanding of the current

environment allows companies to create transparency between groups which opens up lines of communication.

### 2. Architect the Solution

Once a company understands how they will approach handling communication and developing a CQE, architecting the solution becomes a very tactical exercise. This is where a formal plan is created to hone the existing environment into a true CQE. While architecting the solution, it is important for company stakeholders to understand what will be expected of them and how delivering value to the client through proper organizational alignment is going to be defined.



### 3. Managed Delivery

There should be a clear understanding of how the implementation is expected to change the behaviors of the organization and how success will be measured. It is essential to execute flawlessly and with the utmost integrity.



### Understand and Align

The first step in developing a CQE is to evaluate the current environment and define what customer service means to the company. During this exercise, questions will arise about the differences between internal and external client satisfaction. It is important to be clear that external client satisfaction is the priority, however, creating strong, highly customer-centric relationships externally drives positive behavior internally. There becomes a heightened state of awareness about how to think about the client, whether internal or external. Client satisfaction must start at the top and, since company alignment is the primary goal, senior executives need to be key stakeholders in the decision making process to strategically and tactically align the company with the idea that customer satisfaction should be discussed every step of the way.

While company functional and communicative alignment is imperative, defining customer satisfaction in the products that are developed and deployed is also important. From the inception of ideas about products to bringing a product to Generally Available (GA), customer satisfaction should be addressed throughout the entire product development life cycle. Each department responsible for making product delivery a success, including Product Development, IT Development, Quality Management, Sales and Operations, all need to be in alignment with how the product will be developed and deployed according to standards set by the SMO. The SMO represents the customer in the product life cycle and provides standards of excellence that illustrate cost reductions and product efficiencies. The SMO also develops a communication plan to ensure proper management of the customer experience.

*“It is important to deliver customer satisfaction through the products you own along with the organizations you manage.”*

As roles and responsibilities are defined for the customer champions within the company, the SMO will need to rely on internal management to define it properly. This is where the rubber meets the road for customer accountability. It is important to establish a clear definition of who will be accountable to address customer satisfaction and who will help implement business process around quality customer service. A champion is empowered to be the voice of the customer. While the SMO will facilitate driving customer satisfaction standards, the champions will implement customer satisfaction as they interface with their groups and organizations. The internal client champions will also develop the customer satisfaction plan. They will work with business process owners on how to take customer satisfaction into

*“Through the implementation of a proactive SMO, companies can increase customer satisfaction.”*

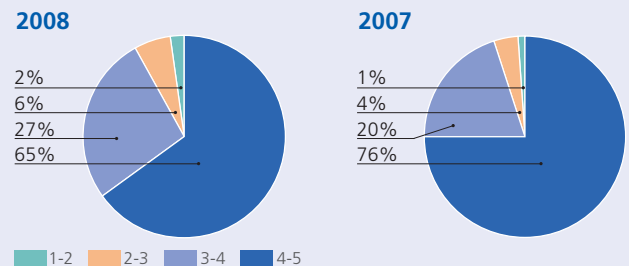
consideration when aligning business processes. This is where internal customers become concerned with their processes and how they might be adjusted to address quality with efficiency. The most efficient business process can provide poor quality to the end product. There exists a balance between efficiency and quality and each company must define how the scales tip as it relates to their business. The more advanced businesses develop very efficient processes that also provide the highest levels of customer satisfaction.

A gap analysis will address the differences between the current environment and where the company needs to be to meet client-specific needs and will also provide an understanding about the organization and the definition of quality for the company. The analysis will show how customer satisfaction was taken into consideration at each stage of every business process. Once the gap analysis has been developed, milestone timelines will allow each group to align with the SMO’s overall plan to drive customer satisfaction. The success of a closed gap is measured through a series of metrics. There are many tools that can be used to define metrics for client satisfaction. One example is the Help Desk Institute (HDI). HDI provides industry resources to worldwide members including a member’s toolbox, forums, research and e-newsletters. Members can download white papers, focus books and metrics guides.

Below is an example of a report that HDI provided in their annual publication regarding how customer satisfaction is measured. In 2008, 65% of companies attained a 4-5 rating, on a scale of 1-5, from their clients. This was down from 76% in 2007.

### Customer Satisfaction

On a 1-5 scale (5 being the highest), what is the customer satisfaction rating?  
(Includes only those who measure customer satisfaction)



2008 HDI Salary and practices survey

Other organizations, such as Gartner Group, can also be helpful. It is best to use a few references to give perspective and remove any biases on how to measure customer satisfaction.

When closing the gaps to achieve the highest levels of customer satisfaction, the best ideas get incubated through the development of specific goals at the individual contributor level. When employees feel a sense of ownership, they bring their best work. From this work, a collaboration of information comes together as a project plan that is owned and executed by the SMO.

There are many tools on the market and they are all slightly different from each other. The following list provides an example of some of the tools that organizations use:

#### Service Desk Tools

Heat	Numara Footprints
Peregrine ServiceCentre	CA Advanced Help Desk
Remedy	Netman
Infoman	LinuxDesk

When working through which tool is right for your environment, several considerations must be taken into account:

- Price (licensing)
- Implementation (customization and configuration)
- Training needs
- Company alignment to the tool
- Automation, integration and workflow design

As you evaluate different tools, it is important to keep in mind the support of advanced operations, such as customer satisfaction metrics management, and how the technology integrates within the SMO environment. Full transparency of information will allow the SMO to drive results back into the organization while providing feedback, this is what it means to have a true CQE.

#### Architect the Solution

The “Solution” in this case is increased external customer satisfaction. The architecture of the solution is the overall process that is implemented as a result of each group conducting an introspective analysis of their organization while determining how to achieve high levels of customer satisfaction. In some cases a business process might be implemented, a piece of software could be installed, or the solution may be as simple as setting certain expectations as the groups look at how they interface with other areas of the organization. There are no hidden agendas in providing great customer service. A facilitator or mediator may be necessary to ensure there are no agendas in the process. Full transparency breeds trust that will ultimately allow companies

to attain great growth through proactive customer service.

The first step in getting people onboard with the idea that a true CQE needs to be developed is to form a service management “Steering Committee”. The steering committee will include representation from each major area of the company responsible for creating high levels of client satisfaction. The steering committee will also include representation from the company’s most trusted clients who are not afraid to give an opinion on how to best service their needs.

The committee will start by viewing the project plan and addressing the priority sequence of customer satisfaction milestones. Out of this exercise will come a rifle approach to managing the CQE implementation. The steering committee will then stay engaged throughout the implementation as a governance board to ensure risk management is addressed in each area including:

- 1) The establishment of SLAs and metrics
- 2) Quality interactions between business processes
- 3) Procedure development
- 4) Preemptive, proactive communications

When kicking off the internal projects, start where your company can have the most impact on client satisfaction. Pick an area where there is dual benefit (i.e. where automation will help the client as well as the internal organization). Often, going after the easiest issues or the cheapest route does not garner the expected results. Your decisions must make a noticeable positive impact on customer satisfaction.

Some groups will decide to manage the low hanging fruit and others will want take on the biggest issues facing their organization, but in the end it has to become an achievable project within the timeframes set by senior management.

In project management, change is an area where the most effective companies lack efficiency. Managing change is an art form in most organizations. Because this effort touches many areas of the company, change management becomes a creative exercise to manage all of the dependencies. The SMO organization, who will manage the change process, can employ a “Fix It Once and Forever” methodology to mitigate change issues. The idea is to touch the issue one time and fix it forever, never to see the issue again. In order to ensure that each group is addressed through the change management process, a “Nothing is Left to Linger” attitude will help drive forethought before action. Increases in forethought will develop harmony in execution internally and create solid expectations externally while increasing customer satisfaction numbers. If your clients get what they expect, customer satisfaction scores go up.

*“With the help of a steering committee and an implementation framework, the Service Management Organization will become the Center of Excellence for customer satisfaction, the true voice of the customer.”*

Once a solution has been developed and your company is ready to implement, a deployment plan will identify operational readiness. While managing the release of a product or process, whether internal or external, the SMO should always align the needs of the customer with the release management process. Clients need to be notified before, during, and after changes are implemented. Through this process, a client communications plan is created primarily through the marketing organization to ensure communications are properly delivered and the company brand is protected.

### Managed Delivery

While the SMO steering committee drives customer service standards, an internal SMO project organization drives the projects necessary to meet those standards. The project organization will ensure customer service continuity across the company and will emphasize the importance of driving high customer satisfaction standards.

Represented below is a framework to help create the basis for a project plan.

Executing with a preemptive communication style will develop trust with the end users and create an environment where all stakeholders will expect frequent communication. Customer satisfaction is collaborative - change cannot move forward without acceptance from everyone involved and each area should look for ways to improve other departments by constantly measuring and challenging the norm to raise the standard of excellence.

### Conclusion

Although driving high customer satisfaction results is often challenging for most companies, it is attainable through a managed approach. With the help of a steering committee and an implementation framework, the Service Management Organization will become the Center of Excellence for customer satisfaction, the true voice of the customer. This strategy, where the client drives the customer experience, creates an environment where every decision is made with a customer focus.

### Implementation Framework

