

CASE STUDY

Customer experience transformation

Our client needed help transforming their customer experience

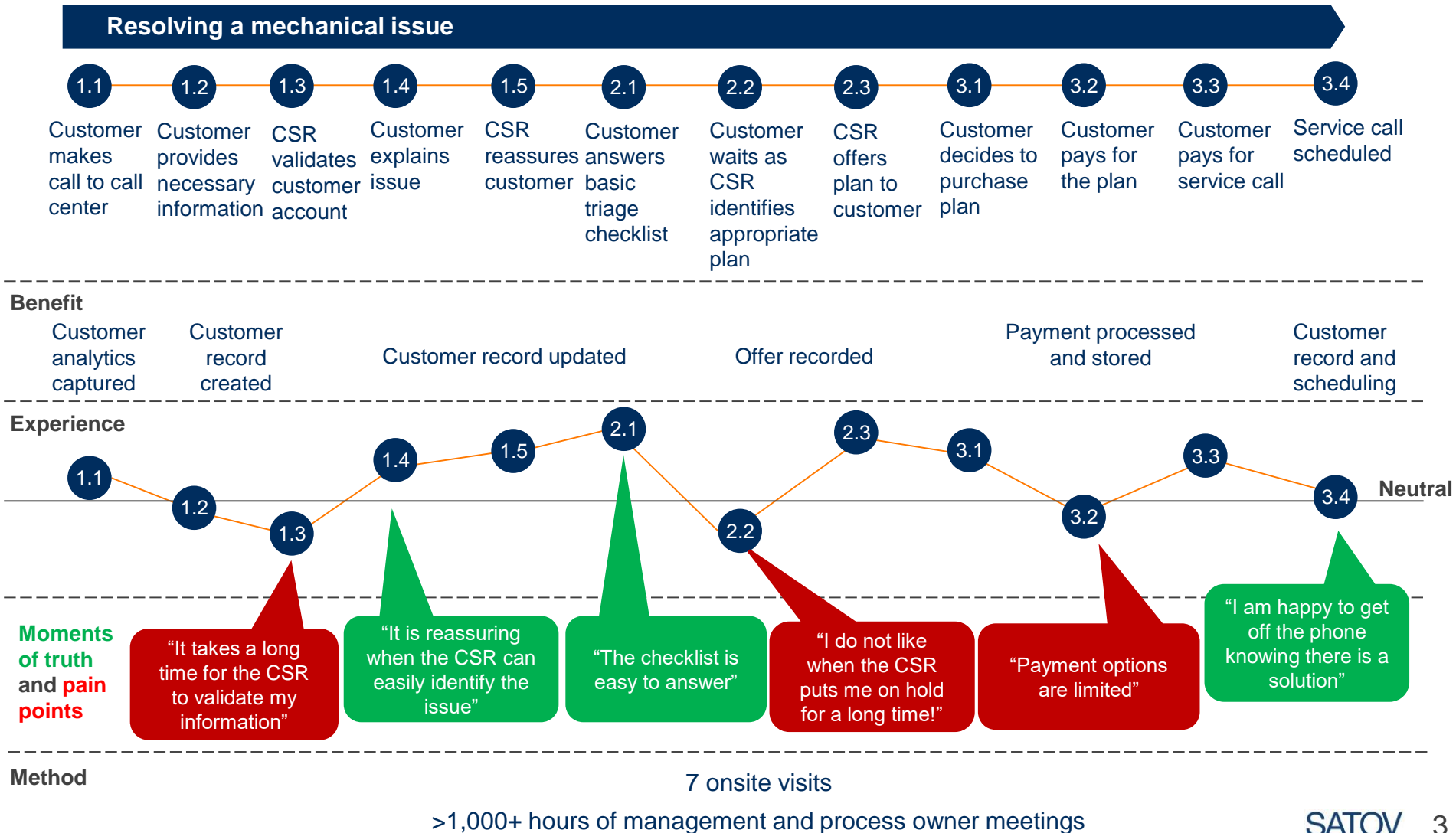
A large North American residential services provider planned to radically transform customer experience across several business units

Customers often purchased multiple services across various business units, requiring harmonized experience and life cycle management

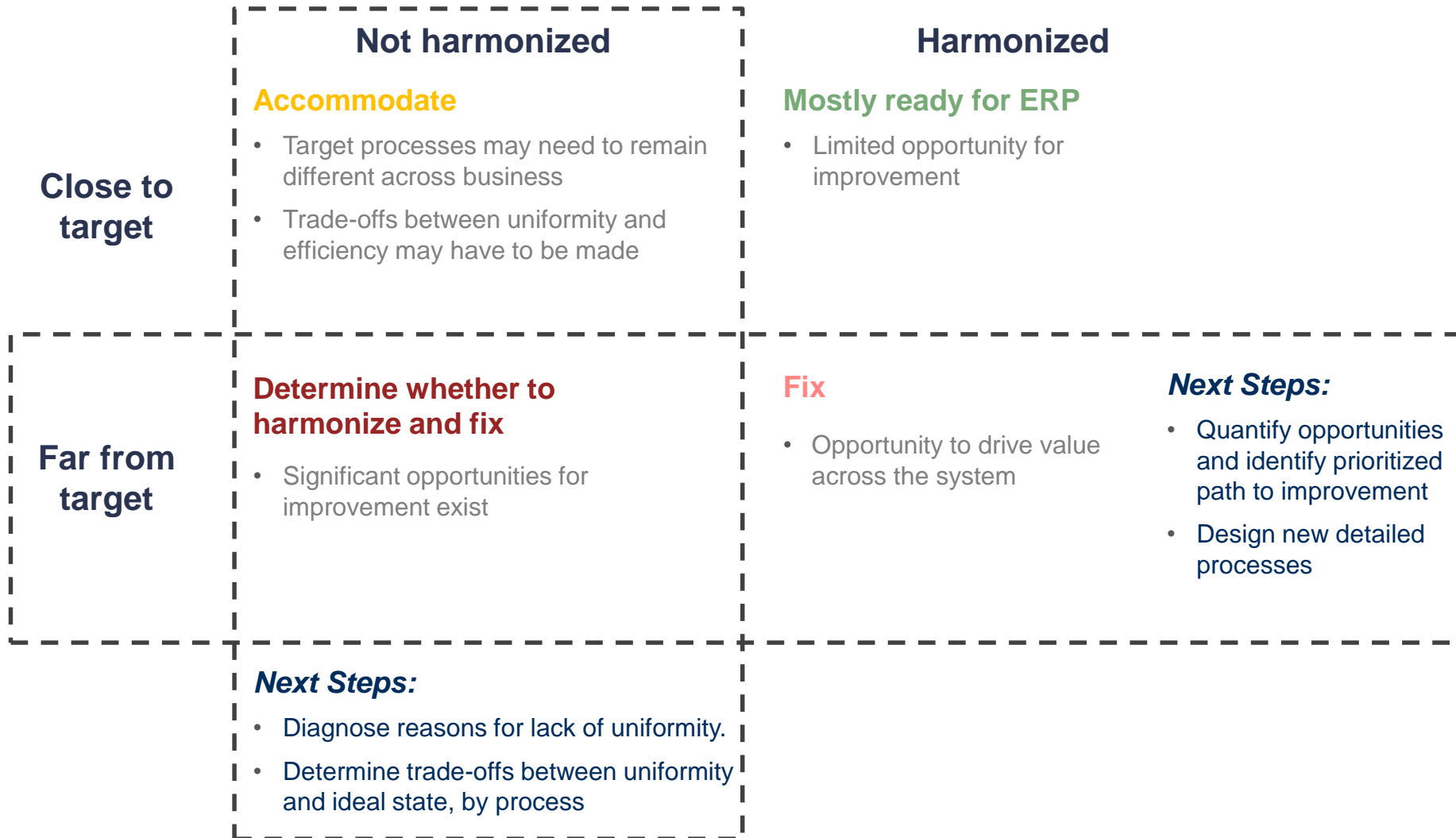
SATOV was engaged to work alongside business and technology leaders to map the current customer journeys and design the future state

We identified multiple ways to drive the customer experience and improve marketing while generating savings from activities customers did not value

We developed journey maps for all major customer interactions



We categorized current processes into actionable buckets



We identified and evaluated opportunities through several filters



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|--------|--|--|--|--|
| Filter | <p>By integrated experience across processes</p> <ul style="list-style-type: none"> E.g.: Repair call, purchasing equipment | <p>By functional area:</p> <ul style="list-style-type: none"> E.g.: Call Centre, dispatch, field automation | <p>By benefit type</p> <ul style="list-style-type: none"> E.g.: Reduced truck rolls | <p>By initiative</p> <ul style="list-style-type: none"> Interdependencies among initiatives Value, certainty, ease of implementation |
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|----------|--|-----------------|-------------------------------|-------------------|
| Question | Does it match our target customer journey? | Can we do this? | How much is this worth to us? | What comes first? |
|----------|--|-----------------|-------------------------------|-------------------|

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| Stakeholder involvement | Business leaders | Functional process leads | Process leads and project team | Project team |
|-------------------------|------------------|--------------------------|--------------------------------|--------------|

We set up the analytical framework for each opportunity

Illustrative example

| Opportunity | Customer event | How benefit is realized for the customer | Need to believe | Analytical approach (quantification of benefit) |
|---------------------------------------|----------------------|---|--|---|
| Eliminate tech pre inspections | Buying new equipment | Less disruption in the home Faster call to service | Most Pre-inspections can be eliminated by taking pictures during sales process The current number of pre-inspections and the resulting cost is material | Quantify the number of pre-inspections per year (by business) Establish the time required for a pre-inspection Establish total cost by applying fully loaded costs and / or evaluate potential opportunity costs |

Initiatives required to support opportunity

| ERP | Centralized call center | Centralized dispatch | Handheld technology | Shared service consolidation | Web self service | Product portfolio complexity reduction | Logistics centralization |
|-----|-------------------------|----------------------|---------------------|------------------------------|------------------|--|--------------------------|
| ✓ | | | ✓ | | | | |

We evaluated the benefits of new processes

Reducing phone calls

Process gaps

A lack of information on the website causes substantial low/none revenue phone calls from customers to the call centre

Examples:

Appointment status updates, billing questions, part order updates, maintenance appointment booking

Solution

Improving data availability on the website will enable customer self service

Benefit to customer

Immediate answers

Ease of use

Less wasted time

We quantified and prioritized opportunities

