### **CASE STUDY**

**Customer experience transformation** 

# Our client needed help transforming their customer experience

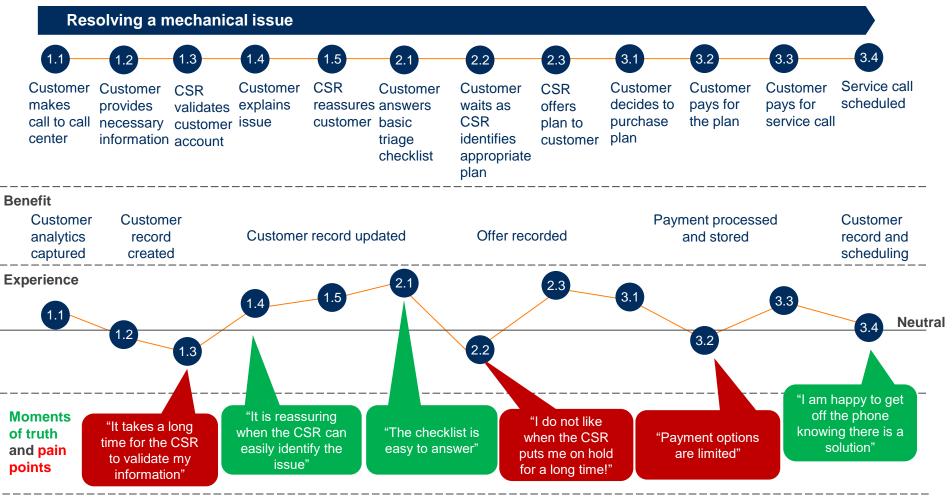
A large North American residential services provider planned to radically transform customer experience across several business units

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



#### Method

7 onsite visits

>1,000+ hours of management and process owner meetings

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### We categorized current processes into actionable buckets

	Not harmonized
	Accommodate
Close to	Target processes may need to remain different across business
target	<ul> <li>Trade-offs between uniformity and efficiency may have to be made</li> </ul>
	! 
I I I Far from	Determine whether to harmonize and fix

 Significant opportunities for improvement exist

#### Next Steps:

target

- Diagnose reasons for lack of uniformity.
- Determine trade-offs between uniformity and ideal state, by process

#### Fix

• Opportunity to drive value across the system

Mostly ready for ERP

• Limited opportunity for

improvement

Harmonized

#### Next Steps:

- Quantify opportunities and identify prioritized path to improvement
- Design new detailed processes



## We identified and evaluated opportunities through several filters

	Customer experience	Internal responsibilities and controls	Benefit quantification	Prioritization and implementation planning			
Filter	By integrated experience across processes • E.g.: Repair call, purchasing equipment	<ul> <li>By functional area:</li> <li>E.g.: Call Centre, dispatch, field automation</li> </ul>	By benefit type <ul> <li>E.g.: Reduced <ul> <li>truck rolls</li> </ul> </li> </ul>	<ul> <li>By initiative</li> <li>Interdependencies among initiatives</li> <li>Value, certainty, ease of implementation</li> </ul>			
Question	Does it match our target customer journey?	Can we do this?	How much is this worth to us?	What comes first?			
Stakeholder involvement		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 <b>and / or</b> 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				
<b>√</b>			$\checkmark$								

### We evaluated the benefits of new processes

### Reducing phone calls

#### **Process gaps**

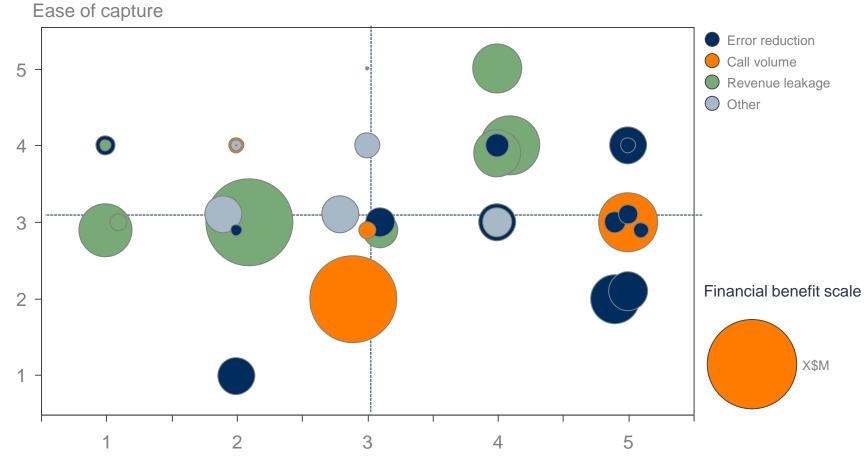
A lack of information on the website causes substantial low/none revenue phone calls from customers to the call centre

*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



Customer impact

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### We developed a detailed implementation plan

	20	12	2013												
Initiatives	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Primary Owner
Mobilize															Megan James
Establish PMO governance															Rick Smith
Submit IS requirements		-i													Rick Smith
Quick wins	4	<b>∖</b> ∳ ∠													Manager
Billing transfers	11.5	5 - 11.9	9												Chris Smith
Transfer speed dials	11.5	5 - 11.9	9												Chris Smith
Authentication		11.12	- 11.3	0									l i		Wayne Price
Renewal		111.1	12.1												Wayne Price
Duplicate site creation		11.1	- 12.3												Chris Smith
Medium term															Andrew Duncan
Unsuitable appointments		-	1	1.12 -	1.22										James Smith
Create PP simulator		- i - i		1	.1 - 2	.16									James Smith
Expand PP calculator				1.	1 - 2.1	5									James Smith
Call routing						2	4 - 4.1	8							James Smith
Attaching contracts					2.10	- 3.5									Wayne Price
Maintenance upgrade canx		11		1.	1 - 2.1	5									Wayne Price
Saves compensation					1.2	1 - 3.1	2								Ed James
Long-term													•		Carlo Rodrigues
Credit errors								2	.4 - 6.	21					Terry Sax
Self service											1	1.7 -	10.4		Ed James
Simplify dropdowns/ cases		i I								3.4 ·	8.6				
Queue metrics											3.4 ·	9.6			
Renewal letter cancellation							I			1			3.	11 - 11	.15