



*Customer Experience
Due Diligence
Market Research
Employee Engagement*

Achieving Higher Profitability, Cash Flow & Competitive Differentiation

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Agenda

1. Introduction: Who does CEX now?
2. Benefits of executing a CEX study
3. How to optimize CEX initiative
4. When to implement CEX Program

Introduction

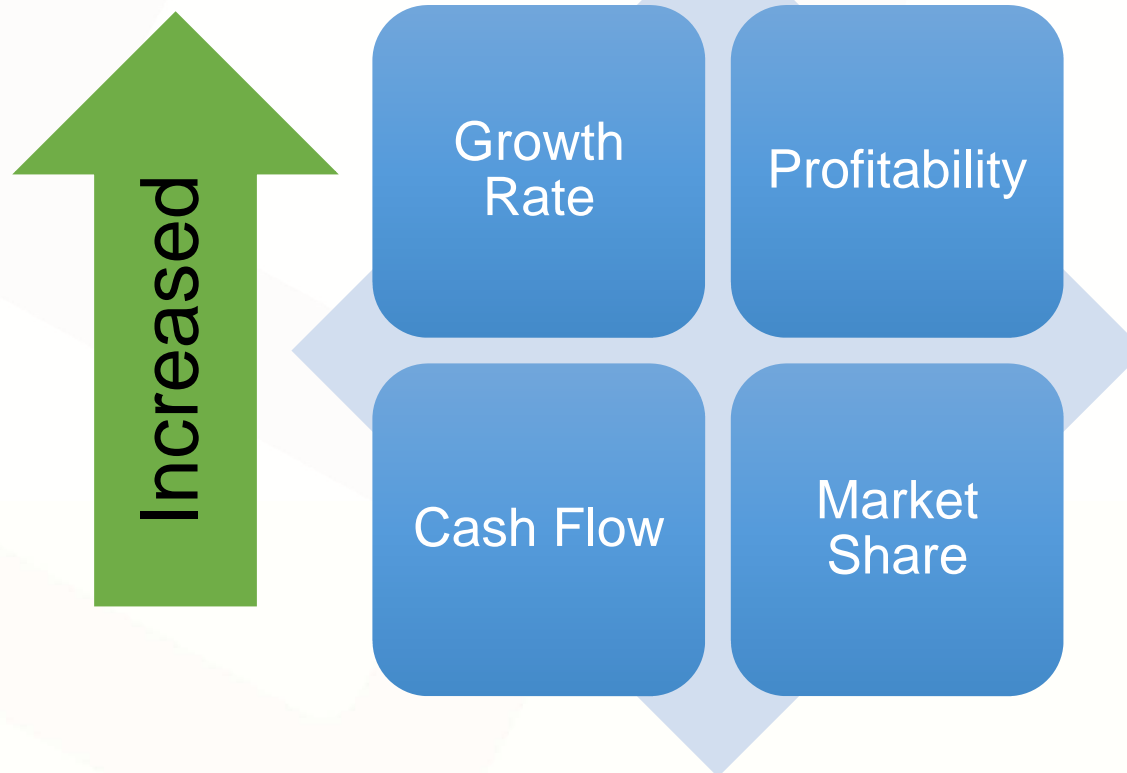


Does anyone survey customers?

What do you like?

How do you use the information?

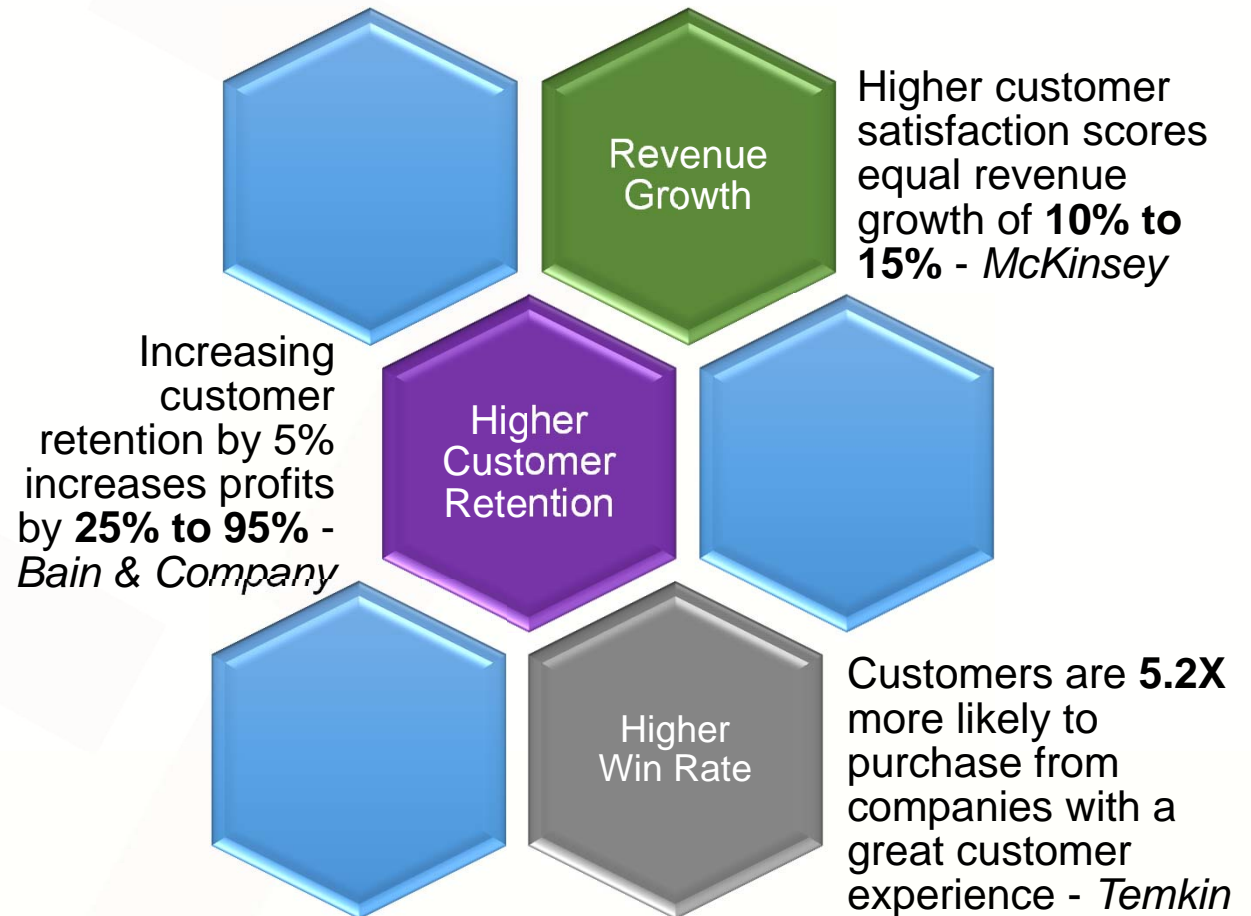
How to utilize Customer Experience Research to increase profitability, cash flow & market share.





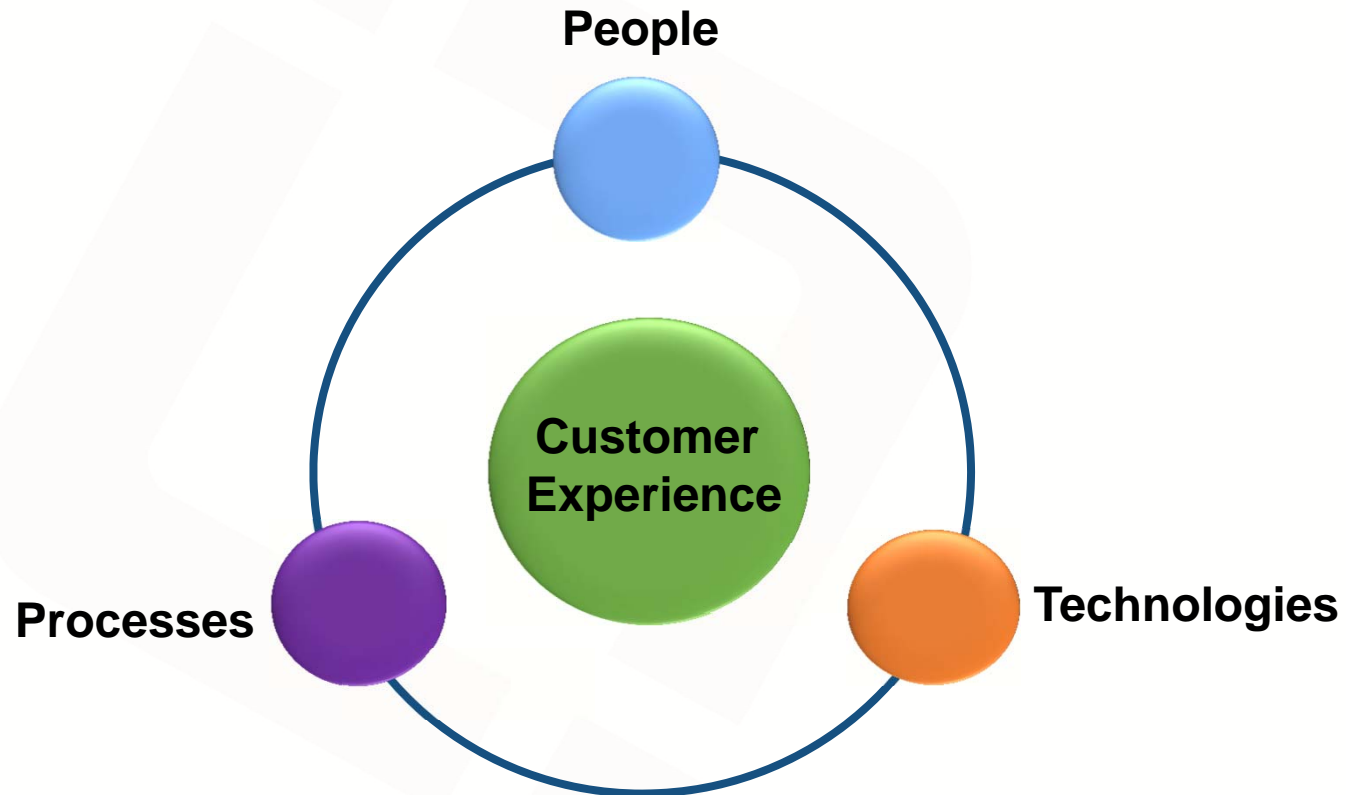
Measuring CEX is a Key Differentiator

Improving customer experience drives higher customer **retention**, higher **profitability** and **cash flow**, and more **new customers** through referrals





Identifying the Problem



End Result of CEX



Case Study

CEX case study – Success Story





How to optimize CEX initiative



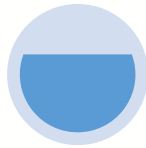


3 Simple Steps in Research



What?

...is it you
need to
know?



Who?

...has the
information
you want to
know?



How?

...can you
effectively
and
efficiently
find that
information?



The Process

Customer/Market Requirements Gap Analysis

- Comparison of customer defined vs. management perceived requirements

Critical Success Factor Identification

- Determination of critical factors that must be present to support positive Customer Experience

Business Strategy/Supply Chain Alignment

- An analysis of how effective the Quote to Cash process is in supporting the Customer Experience

Benchmarking

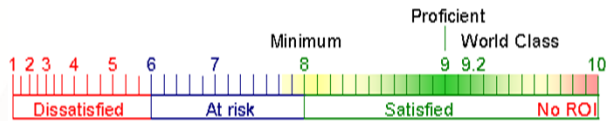
- A comparison of client's QTC KPI's to industry performance

Action Plan

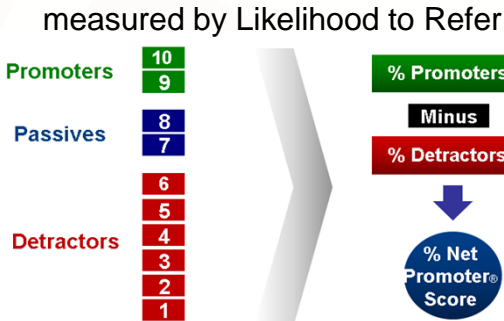
- Opportunities for aligning your QTC process to achieve your Customer Experience goals



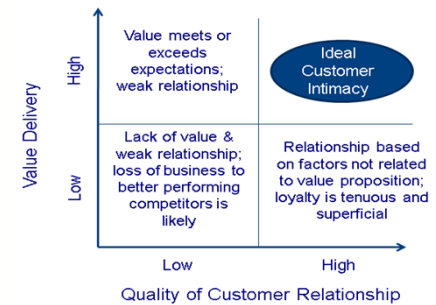
Overall Satisfaction



NPS



Customer Intimacy



CSM views these key analyses as the means to measure and assess your true value delivery and often as a double check between them

Based on the assessments above, the P/V Gap analysis evaluates pricing opportunities

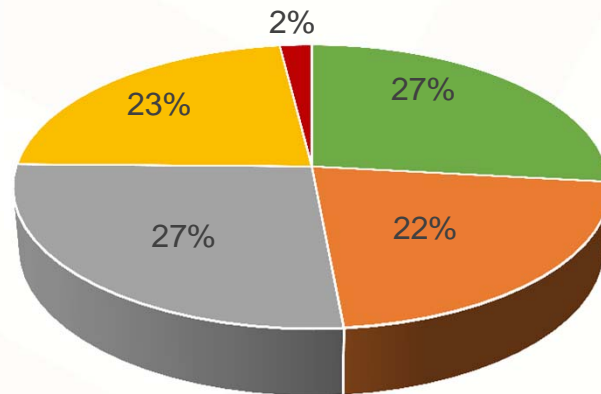
Price / Value Gap





Customer Segmentation an Account Management Tool

Loyalists <i>Use for marketing/referrals and possible cross-selling</i>	Pricing Opportunities <i>Leaving Money on the Table</i>	Lukewarm <i>Risk for defection BUT high potential to become Loyalists</i>	On Edge <i>Risk for defection BUT high potential to become Lukewarm</i>	Defection <i>High risk for defection</i>
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- Loyalist
- Pricing Opportunity
- On Edge
- Lukewarm
- Defectors





When to implement CEX Program?





Questions Indicating Cash Flow & Profitability
Improvements are Needed
(time to engage Corporate Research Firm)

What can we
do to improve
cash flow?

Why are we
not hitting our
growth
targets?

Is my M&A
valuation
accurate?

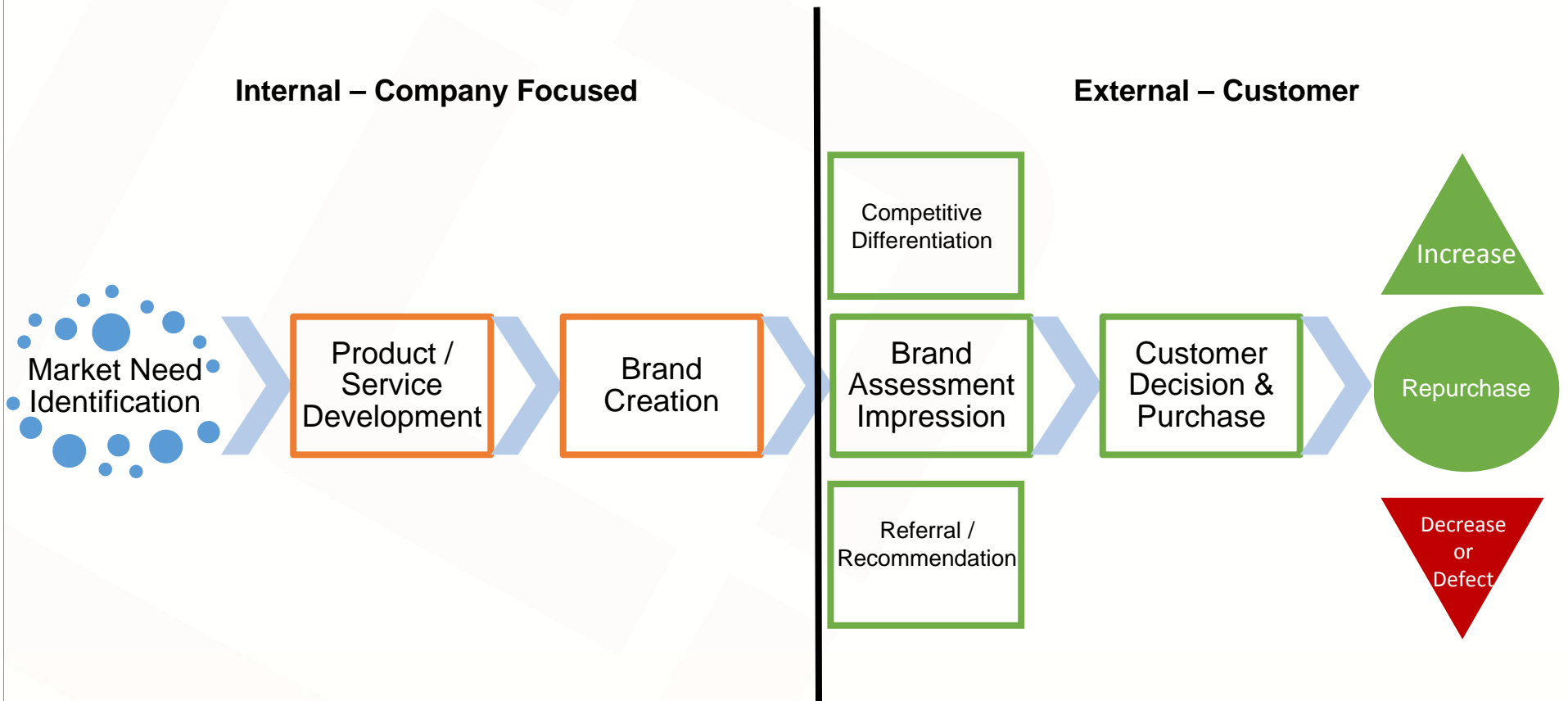
What are our
competitors
doing better
than us?

How can we
improve the
valuation of
my
company?

Why aren't
we getting
more
referrals?



Research Throughout Business Value Chain



Types of Research

- Win / Loss Studies
- M & A
- Customer Experience
- Employee Engagement
- Brand Positioning
- Competitive Studies
- Cross Border Growth Opportunities
- Market Area Research; i.e. demographic and psychographic profiles





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