

Finding Cracks in the Customer Experience

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Background



A B2B firm had concerns about the sales & service cycles. New client acquisition was down, and current client dissatisfaction was creeping up. The company had no clear data identifying cracks in either funnel and didn't know how to easily obtain this information.

Solution



Ann Michaels & Associates concurrently implemented mystery shopping & segmented feedback programs. Mystery shopping focused on the sales funnel while feedback surveys were dispatched at various stages of the customer cycle to pinpoint areas that may need improvement.

Results



The company identified several instances in which cracks in the sales cycle led to sales prevention. Through the feedback program, it was quickly determined that, while overall satisfaction levels were solid, there was a clear opportunity for improvement in the billing process.

The Results

- After a phone system upgrade, after hours calls for a specific product line were being routed to an extension no longer in use, resulting in loss of potential sales.
- Online inquiries were not always directed to the appropriate person; on internal review, the process was clarified and communicated to staff so potential customers didn't get "lost in the shuffle."
- Feedback revealed that a current billing process caused the most frustration for clients, and processes were streamlined based on this information.
- Feedback also showed that client frustration was identified at the onboarding stage; clearer communication on expectations for new clients was developed based on these results.
- The programs allowed the company to improve processes and ensure stronger customer service for potential & existing clients. Both programs were continued for ongoing monitoring to maintain solid customer experiences.

