



## Customer Experience | Customer Retention Project A BUSINESS CASE STUDY

### CUSTOMER DESCRIPTION AND PROJECT OBJECTIVE

Mid-sized, well-established Twin Cities-based technical services and IT company providing managed services to customers in corporate, institutional, non-profit and educational sectors.

The business owner was concerned about customer retention and said that they were “really good at selling themselves and their services,” but felt that the on-boarding of new clients and the delivery of promised services was inconsistent – their expressed workplace performance GAPS.

### PROCESS AND SCOPE OF WORK

We were originally hired to evaluate companywide performance markers, focused on sales and operations, and employee engagement. Based upon that project’s **Priority Recommendations**, we were hired to learn more about customer perceptions of sales engagement with customers, the promises made by the sales representative and the delivery of contracted services by operational personnel.

We qualitatively interviewed a mix of customer types in two different groups, with the second group interviewed a few months after the completing the first set of interviews. We conducted semi-structured, hour long, in depth interviews with customer executives. Third party objectivity of qualitative interviewing processes gets at emotions and “client wishes” that cannot be obtained by survey methodologies or by client companies themselves.

### PROJECT OUTCOMES

Observations and specific interview comments were compiled and scored on a predefined set of issues. While interview questions are always customized to client circumstance, we seek insights into: **“What is working?”** (Strengths), **“What needs immediate improvement?”** (GAPS), and **“What is the one thing that would dramatically add value?”** (Top priority).

Client comments are anonymous – assimilated into a broader set of customer feedback – unless those interviewed specifically opt for open disclosure. Most executives do opt for open disclosure. Again, we customize the specific issues to be addressed with our client, and anticipated challenges with their customers. We typically address:

1. Sales Representative selling behaviors and promises made
2. Sales Representative engagement as the client is on-boarded
3. Operational engagement as the client is on-boarded
4. Administrative engagement, such as: invoicing, service/product order responses, etc.

While our interviews typically generate moderate communication and behavioral recommendations, in one instance we were able to identify and help our client to immediately “save” a customer relationship that had become challenging, transforming it into one of their most satisfied customers.

Valuing the impartiality in our process and the feedback from the interviews, our client has created a Customer Experience Ratio tied to their KPIs and declared 2016 as the year to optimize Customer Experience.

We are hired semi-annually conduct additional qualitative client Customer Experience interviews, targeting clients recently on-boarded and any clients that have not renewed managed service contracts, and to recommend improvements to the company’s culture, to further leverage the growth they are seeing since working with GAPWORX.

### For Additional Information, Please Contact:

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