

MANAGING CUSTOMERS

POCKETBOOK

***“It is, however, reasonable to have perfection in our eye;
that we may always advance towards it, though we
know it never can be reached.”***

Dr Samuel Johnson

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INTRODUCTION

In today's competitive business world, companies are always searching for better ways to improve their profitability. One of the best ways is to get better at building and maintaining relationships with customers.

This book is a high-level guide to managing customers in data-oriented sectors such as Telco, TV and media, Financial services, Retail, and Asset management.

We've included the best practices, skills, capabilities, and ways to define and implement customer management used by companies that successfully develop longer-lasting relationships with customer to help their business grow.

The content is aimed at those in charge of all or a part of managing customers such as in sales, marketing, customer services, account management, CRM, retentions, and overall base management.

By no means exhaustive it is intended to outline the basics to help understand the concepts and capabilities that help create and maintain customer relationships, including the principles and tools that enable them.

TERMINOLOGY

ACTIVITIES Campaigns, prompts, triggered messages and actions to customers.

CRM Customer Relationship Management that enables assisted sales and service interactions.

CUSTOMER EXPERIENCE The feeling a customer gets from interacting with the business, products and services.

CUSTOMER STRATEGY Principles and parameters for managing customers to achieve a defined goal.

CUSTOMER VALUE The economic and financial worth of a customer to the business.

CUSTOMER ENGAGEMENT The cultivation of a customer beyond the transaction through relevance and value.

ORCHESTRATION A type of air-traffic control for managing all customer interactions within strategy.

PERSONALISATION Tailoring activities and interactions to an individual customer.

ROADMAP A visualisation of the vision, approach and timescales for an initiative or programme.

TRACKS Implements the defined customer journey through business rules and parameters.

TREATMENT Strategy for handling a customer in terms of, e.g., quality of experience, tolerances, etc.

CUSTOMER MANAGEMENT IS MORE THAN CRM

Many businesses treat customer interactions as one-sided transactions, focusing solely on their own needs rather than the customer's. While they may use a customer relationship management (CRM) system, these are often just used for tracking sales leads rather than fostering meaningful dialogue and building relationships with their customers.

It is not surprising, therefore, that a recent survey revealed **66%** of consumers feel that most companies treat them as a number¹.

While a CRM system is a valuable tool, it's just one piece of a larger puzzle in creating genuine customer engagement. Customer management is a holistic approach to creating, nurturing and improving customer loyalty and profitability, from the first interaction to the end of their journey with the company.

This means understanding the customer's changing needs and wants, and then developing strategies to guide how the customers are managed and treated.

1. Salesforce, State of the Connected Customer report, 2023

These strategies should inform business decisions and enable appropriate and consistent guidance throughout every interaction, transaction, and process.

For example, which customers should be prioritised when they contact sales or service? Which opportunities should be introduced to them during a conversation? Which customers get a loyalty bonus? Which customers to target for outreach messages? Which message, and when?

Customer management is about aligning the right strategies to identify customer needs, maintain engagement, develop relevant offerings, and meet expectations, with potential business benefits.

Every business is unique in terms of size, customer base, offerings, goals, strategies, and maturity. Therefore, crafting a customer management strategy should be a bespoke endeavour, aligning with your specific objectives, team, products, processes, systems, and data.

Nevertheless, one universal truth for all businesses is the importance of fostering a customer-centric culture. This means everyone within the organisation, from top leadership to frontline staff, should be dedicated to efficiently meeting customer needs profitability.

MANAGING CUSTOMERS IS IMPORTANT

The world's most successful businesses recognise the significance of actively managing their customer base as an asset of immense value in achieving their goals.

Managing customers means strategically overseeing and maintaining relationships with customers who interact with a business through, e.g.:

- Attracting new customers through marketing, advertising, and sales efforts.
- Encouraging loyalty by providing excellent service, addressing customer needs, and fostering positive experiences.
- Gathering information about customer preference, behaviour, history, profile and value to personalise and improve interactions.
- Listening to customer feedback to enhance products, services, and overall business operations.
- Regularly engaging customers through various channels to answer questions, solve issues, inform, recommend, and build rapport.
- Orchestrating marketing, sales, service and administrative activities to maximise a customer's value to the business.

MANAGING CUSTOMERS IS NOT NEW

Until around the mid-20th century, shopkeepers managed their customers intuitively by personalising the tone and content of their interactions to sell more products.

They knew most of their customers by name and understood their circumstances and the environment they lived in.

Directly observing their customers' browsing and purchase habits helped them know what products and services those customers liked and disliked, how much they would spend, and when.

This helped them know what additional or alternative products and services to offer, when to do it, and how best to go about it.

Even today, research suggests that 74% of consumers believe brand loyalty is about feeling understood and valued – not discounts and loyalty perks¹.

This is because when customers feel like they are being understood and valued, they are more likely to trust the brand and continue to do business with it.

1. Redpoint Global, Brand loyalty research, 2022

CUSTOMERS ARE EVOLVING



The internet has levelled the playing field for customers. They now have access to almost infinite sources of global information, advice, products and services available to them whenever, wherever and at whatever price they want.



Customers increasingly trust technology to make decisions for them: digital investment advisors, smart fridges, self-serve and chat, music and film recommendations, journey navigation and other 'artificially intelligent' tools permeating lifestyles.



Digital channels have disintermediated businesses from direct control over the traditional sales process. There are fewer barriers to customers switching suppliers on a whim and a plethora of competitive offers encouraging them to do so.



Satisfaction is no longer a guarantee of repeat business, and loyalty is more likely to be just complacency on the customer's part. However, customer expectations are significantly higher around value for money and level of service.



The traditional stages of life are giving way to more significant life events less driven by time, such as achieving a qualification, first job, leaving home, getting married again, holidays, children's birth, retirement.

Businesses must think differently about how to manage their customers by recognising that each customer is an individual with different circumstances, needs, preferences, and profitability so, should be managed accordingly.

COMPONENTS OF CUSTOMER MANAGEMENT

OBJECTIVES Defining the primary mission, KPI, regulation, and business oversight	PEOPLE Resourcing, aligning and developing skills and culture	GOVERNANCE Overseeing and aligning all customer strategies, policies, systems, processes, and data
PRODUCT DESIGN Informing product and proposition development, and the enabling features and capabilities	SERVICE DESIGN Informing capability and journey development to implement the treatments	COMMERCIAL DESIGN Informing sales, offer and pricing approach, and the enabling capabilities and journeys
SALES CRM Informing agents with customer and portfolio summaries, and offer and product recommendations	SERVICE CRM Informing agents with customer summaries, and prompts for service and sales-over-service activities	
CUSTOMER DASHBOARD Summarising performance, trends and tracking against targets for the overall customer base	BUSINESS INTELLIGENCE Monitoring sales, service, operations and marketing performance	

	STRATEGY SEGMENTS Defining customer groups using value and potential to determine management approach for each	TREATMENT STRATEGY Designing principles for treating each segment, e.g. grow vs control
	CUSTOMER PLANNING Designing campaign, offer, admin and service activity to engage each segment	ORCHESTRATION 'Air traffic control' of the customers in journeys and tracks applying strategies
DIGITAL CRM Providing digital with offer and service prompts for delivery through, e.g., self-serve and ads	MESSAGING Executing outreach messages informed by customer planning, orchestration, and personalisation	NEXT BEST ACTIONS Prioritising relevant offers, admin and service actions in assisted, self-serve and marketing channels
CUSTOMER INSIGHT Analysing all customer information to identify status, behaviours, profiles, and propensities	TEST & LEARN Incorporating analytical tests into all activities to establish what works best with each customer	OPERATIONAL ANALYSIS Analysing efficiency and effectiveness of activities on different customers

EXAMPLE BENEFITS OF CUSTOMER MANAGEMENT: EFFECTIVENESS

12% increase in customer lifetime value in a UK **digital media** and **telco brand** from strategic customer segmentation and recommendations in all cross-sell, up-sell and retention activity.

23% increase in customer profit in UK **retail banking** from optimising budget allocation between competing product propositions in cross-sell and up-sell campaigns.

9% increase in sales for an **energy company** from optimising cross-sell offers through targeted outbound sales and email campaigns.

5% improvement in repeat booking rates for a **travel group** by recommending vacation types and destinations in email communications.

70% increase in revenue for a global **telco** by optimising offer selection using response predictions and revenue estimates in pay-as-you-go up-sell campaigns.

EXAMPLE BENEFITS OF CUSTOMER MANAGEMENT: EFFICIENCY

20% improvement in click-through rates and better targeting of pre-emptive brand switchers in an Asian **mobile handset brand** using dynamic customisation of content derived from interests.

20% increase in open rates in UK **retail banking** by optimising a 12-month email contact plans for each customer balancing relevance, revenue, cost and contact intensity.

15% increase in revenue in global **financial services** from prioritising lead allocation to branches based on customer travel times, propensities and branch performance.

24% increase in commercial productivity in global **retail banking** from introducing propensity-driven prompts for customers in assisted-channel interactions

EXAMPLE BENEFITS OF CUSTOMER MANAGEMENT: KNOWLEDGE

Introducing portfolio profiles for relationship managers in UK **private wealth management** enables understanding of customer interests, with **deeper insight** into customer potential.

Introducing customer profiles and strategy segments in UK **b2b tool hire** provides **strategic insight** into customer value and behaviour and prioritises activity for account managers.

Introducing econometrics in UK **digital media** provides **forward-looking insight** to better understand how to balance acquisition vs growth vs retention activities in each planning period.

SMALL BUSINESS SIMPLICITY

Successful small businesses are often characterised by high-quality products and services, satisfied customers, and happy employees. This is because they have a:

- Focus on a niche or differentiated product or service and target a small number of customers, which allows them to get to know their customers well and provide them with the best experience.
- Small, unified team with straightforward processes and systems, which makes it easy for them to provide personalised customer service and support.
- Simple, solid idea and vision led by a passionate person, which ensures that the company is focused on the right things and can adapt quickly to changes in the market.
- Commitment to their core values and never lose sight of their customers or their needs.

GROWTH IS THE REAL CHALLENGE

As a small business grows, it can become more complex to manage and stretches the existing capabilities and staff.

With more customers and demand for additional products and services, digital and assisted service channels are needed to support them, requiring more staff and capabilities.

New tools are introduced to solve specific problems, but these are often isolated systems that need convoluted human processes to keep everything joined up.

The company's focus is lost as it tries to do too many things at once, creating more specialised but less connected teams.

Systems and data start to multiply, functional specialisms are created, and business siloes are formed.

The passion becomes diluted and the focus switches to ever higher performance demands against a backdrop of increased public and regulatory scrutiny of reputation, operation and principles in a global, crowded marketplace

The real challenge, therefore, is how to recapture the simplicity of that small, focused business?

BEST PRACTICES

Here are 8 common best practices identified during customer management projects that should be considered to inform and guide implementation and ongoing operations of customer-centric capabilities.

- 1. Put the customer at the heart of business**
- 2. Drive strategy and action with insight**
- 3. Measure, measure, measure**
- 4. Make it relevant**
- 5. Get personal**
- 6. Adapt rapidly**
- 7. Learn, refine, repeat**
- 8. Embed the right thinking**

1. PUT THE CUSTOMER AT THE HEART OF BUSINESS

Consumers want personalised, responsive and high-quality experiences when engaging with brands.

World-class businesses fulfil this by being customer-centric and putting customers at the heart of their business. Everything they do starts with the customer by listening and then adapting to their needs.

The business forms a clear vision that ensures the best possible experience for their customers at every touchpoint, as well as behind the scenes. This vision is translated into a strategy that focuses their resources and capabilities to realise the vision and maximise the customer lifetime value.

Simple, well-designed journeys are mapped out to define the ideal experience for the customer through different business touchpoints. A roadmap is used to provide high-level sign-posting of how the strategy will change the organisation's operation and how the customer, and business, will benefit along the journey.

Having this focus ensures world-class businesses are organising around their customers' needs and delivering the experiences that best engage their customers.

"We're not competitor-obsessed, we're customer-obsessed. We start with what the customer needs and we work backwards."

Jeff Bezos
CEO, Amazon

Netflix personalises their customers' experiences using their behavioural data to recommend movies and TV shows that they are likely to enjoy. This drives engagement, repeat use and improves retention.

Netflix allows customers to create custom profiles, so that each user can see the content that is most relevant to them. Netflix also considers other viewing habits, such as the types of movies and TV series the customer rates highly or that are from particular genres.

Netflix's personalisation algorithm is very effective at recommending other content that customers will enjoy.

A study by the University of California found Netflix's recommendation algorithm was more accurate than those of human experts.

Netflix is constantly innovating and finding new ways to improve its customer experience and, as a result, has become one of the world's most successful companies. For example:

Customer feedback: Netflix regularly surveys customers to get feedback on the service so it can be improved.

Customer support 24/7: Customer support is available by phone, email, or chat, because customers watch content at any time of the day or night.

Free trial: This allows customers to try the service before they commit to a subscription.

2. DRIVE STRATEGY AND ACTION WITH INSIGHT

Analytics is about finding meaningful patterns in data to generate insights which get to the truth of what, how, who, when, where, why and ‘what if’?

For world-class brands, data is the lifeblood of their business. They form a holistic view of their market, operation and customers from all available data sources, both internal and external.

Data is used to derive insight that drives everything from where they should be heading, to how it should get there and what it should do along the way.

Insight informs and challenges the way the business thinks about their customers, propositions and routes to market, driving strategic value creation across the business and decisions in customer experiences. E.g., spotting emerging trends, simulating econometric influences and guiding proposition development.

Insight is also used to drive decisions throughout the customer experience. E.g., in pricing, creating relevant content and creating early event indicators, such as churn triggers.

For world-class brands, insight powers their business by giving them confidence in doing the right thing to maximise their customers’ engagement.

“Consumer data will be the biggest differentiator... whoever unlocks the reams of data that we’re all collecting on consumers, and then uses it strategically, will win.”

Angela Ahrendts
CEO, Burberry

Amazon is known for its data-driven approach to business. The company collects data on everything from customer behaviour to product reviews, and then using it to inform all decisions.

Data is used to understand what products customers are interested in and to recommend other products on the website and in the app.

Amazon also uses data to identify trends in customer behaviour so that new products and services can be developed.

Data and insight have helped Amazon become one of the most successful retailers in the world. It is constantly innovating new ways to use data to improve customer experiences.

For example:

Testing new ideas for products and services: by running A/B tests, Amazon can compare different versions of a product or service to see which one performs better.

Personalising the customer experience: customer behaviour and preferences are used to recommend products, tailor sales messages, and provide more personalised customer service.

Optimising the supply chain: the movement of products through warehouses and distribution centres is tracked to ensure that products are always in stock for customers to receive quickly.

3. MEASURE, MEASURE, MEASURE

Not all customers are equal. Each is an individual that consumes your products and services in different ways, with different circumstances, motivations, interests, preferences and needs.

Measuring customers is critical for world-class businesses to understand and manage them with informed allocation of limited resources.

Measures such as impressions, click-throughs, sales, revenue, conversion, cost per sale and retention rate are easy to measure and good for efficient use of budget.

More advanced measures include the customer's current spend, profitability, recency and frequency of purchase, all of which help to ensure budgets are focused on the right customers. However, these business-centric measures reveal little about the customers, their attitude or potential, meaning the business may be missing opportunities.

World-class businesses also use customer-centric measures to form a picture of who their customers are, how engaged they are, and how much more they could spend. These measures include satisfaction, NPS referrals, engagement, value by segment, predicted offer propensities, potential value, demographic profile, behaviour classifications, and outreach responses.

"You can't manage what you don't measure."

Peter Drucker
Father Of Modern
Management Theory

The **Walt Disney Company** uses customer performance metrics to track things like customer satisfaction, repeat visits, and social media engagement.

This information is used to improve the Disney experience, such as by making theme parks more exciting or by developing new movies and TV shows that customers will enjoy.

For example, customer satisfaction surveys track how happy customers are with the theme parks. If the satisfaction scores are low, Disney may need to improve the rides or the food.

Disney also uses social media engagement data to track how many people are talking about Disney on social media. If the engagement is low, Disney may need to create more engaging content.

Apple tracks things like satisfaction, product reviews, and app downloads. This information is used to improve experience, such as by making products more user-friendly or developing apps that customers want.

Starbucks tracks things like satisfaction, loyalty program participation, and store traffic. This information is used to improve the Starbucks experience, such as making stores more inviting or by offering better customer choice and service.

Nike tracks things like customer satisfaction, product returns, and social media engagement. This information is used to improve experience, such as making products more comfortable or by developing new marketing campaigns that resonate better with customers.

4. KEEP IT RELEVANT

Consumers are savvier: They are digitally aware and able to actively avoid irrelevant marketing efforts by, e.g., skipping past TV commercials, opting out of marketing, screening calls, using ad-blockers, and filtering spam.

World-class brands ensure that everything they do is relevant to ensure they reach each customer in the most effective way.

They start by listening to what their customers are saying and observing what they do and how they do it, which they garner from deep insights they have access to within their business and market.

These insights provide them with full understanding of the unique circumstances, behaviours, needs, wants, interests and other characteristics of each customer in the context of the market and the business' ability.

This deep level of understanding enables them to predict the influence of different actions on each customer, adapt their marketing strategies accordingly and then create the most meaningful content and messages to engage them.

"Get closer than ever to your customers. So close that you tell them what they need well before they realise it themselves."

Steve Jobs
CEO, Apple

Spotify collects data on what customers listen to, what they like, and what they dislike, and uses it to create playlists that are tailored to each individual customer's listening habits.

E.g., a customer likes or listens to a particular song so, Spotify will likely recommend other songs by the same artist, as well as songs by other artists in the same genre.

Spotify's personalised playlists are popular with users, with 70% of users claiming to use personalised recommendations according to a study by the Pew Research Center.

Spotify is constantly innovating and finding new ways to use data to improve the customer experience, which has made it one of the most popular music streaming services in the world.

Facebook uses customer data to show ads that are relevant to interests. Data is collected on what pages customers like, what posts they interact with, and what websites they visit.

This data is then used in a personalised ad targeting algorithm that identifies ads most likely to be of interest to each individual customer.

Google uses customer data to personalise its search results based on keywords that customers search for, the websites they visit, and the type of content they interact with.

This data feeds into the search algorithm that shows both sponsored and natural results likely to be of interest to each individual customer.

5. GET PERSONAL

Being customer-centric means putting the customer first. E.g., instead of creating an offer and then trying to find customers to target, a customer-centric approach starts with the customer and asks, "What's the best thing I can do for them?" which means it may not be an offer, but another action.

World-class businesses embrace this by personalising every interaction they have with their customers. Personalisation is more than just using the customer's name - it means customising every experience, based on their interests, needs, and preferences.

To do this, world-class businesses use all available data and insights. They look at things like purchase history, browsing behaviour, and social media activity to get a better understanding of each customer.

This informs creation of personalised communications, recommendations, and customer service experiences, which can be challenging, but worth it.

Personalising customer interactions creates a more meaningful and engaging experience that leads to increased loyalty, satisfaction, and ultimately, sales. E.g. A clothing retailer sends a personalised email to a customer who has recently viewed item on their website, which includes a discount code for the item.

"The key is to set realistic customer expectations, and then not to just meet them, but to exceed them - preferably in unexpected and helpful ways."

Sir Richard Branson
Founder
Virgin Group

Walmart uses customer data to personalise its customers' shopping experiences by using data on what they buy and what they browse on the web to create in-store displays and targeted recommendations tailored to each individual customer's interests.

Banks use personalisation to offer customers tailored financial products and services based on income, spending habits, and goals.

For example, a bank might offer a high-yield savings account to a customer who has a history of saving money.

Target uses a similar approach to send email marketing messages and display ads that are personalised to each individual customer's interests.

In **travel**, personalisation is used to recommend destinations and itineraries to customers based on their interests, budget, and travel preferences.

For example, a travel company might recommend a beach holiday to customers who have previously searched for flights to Bali.

6. ADAPT RAPIDLY

Businesses need to be able to adapt quickly to changes in the market, competition, or internal priorities.

World-class organisations are constantly reprioritising their initiatives and activities to stay ahead of the curve, and within budgets.

They listen closely to their customers and make sure their capabilities and resources are aligned with those needs as quickly as possible.

This is done through a variety of nimble development techniques, such as Agile, that bring together users, business experts, developers, and implementers in tightly integrated teams that can be quickly prioritised to best effect.

These teams are empowered to make decisions and align their resources based on what will create the most value for customers and the business. They use prototyping to quickly test new ideas before making larger investments.

By being nimble, world-class businesses can be more responsive to their customers' changing needs and deliver experiences that drive better engagement.

“Willingness to change is a strength, even if it means plunging part of the company into total confusion for a while.”

Jack Welch
CEO
General Electric

IKEA adapted to the COVID-19 pandemic by closing its stores and pivoting to online sales. IKEA also launched a new service that allowed customers to order furniture online and pick it up curbside.

Similarly, **Starbucks** adapted to the pandemic by closing its stores for in-person dining and offering only drive-thru and delivery options. It also launched a new mobile ordering app to make it easier for customers to order and pay for their coffee.

Apple uses an agile approach to product development, breaking down its products into small, manageable chunks called features. Each feature typically lasts a few months, and at the end of each feature, the team delivers a working product increment.

Tesla uses a variety of agile practices, including scrum and extreme programming (XP). XP is a set of agile practices that emphasize simplicity, testing, and communication.

Coca-Cola uses an agile approach to marketing whereby campaigns are broken down into small, manageable chunks called activities. Each activity typically lasts a few weeks, and at the end of each activity, the team evaluates the results and makes changes as needed.

7. LEARN, REFINE, REPEAT

To create real customer value, businesses need to constantly listen to what their customers need and want, and to be willing to adapt their products and services to meet those needs.

Leading organisations are always looking for new ways to understand their customers better. They use data and analytics to track customer behaviour and preferences, and they also talk to customers directly to get feedback.

Once businesses understand their customers, they can start to create value propositions that meet those needs. This might mean offering new products or services, or changing the way they deliver existing products and services.

Leading organisations are also constantly experimenting with new ideas because they don't assume that what worked for one customer will work for another, nor what happened in the past. They test different ideas with different customers, measuring the results of these tests to see what's working and what's not. They use this information to refine their ideas and make them even better.

This continual process of testing, learning, and refining is essential for creating real customer value. It's also a way to stay ahead of the competition and ensure that businesses are always providing the best possible experience for their customers.

*"Failure is an option here.
If you are not failing, you
are not innovating
enough."*

Elon Musk
CEO, Tesla

Zappos is an online shoe retailer that is known for its excellent customer service: its mission is to "deliver WOW through service."

The company uses a test and learn approach to constantly test new ways to improve the customer experience.

One example, is "Zappos Customer Advocates", a program where employees are empowered to make decisions about serving customers and are encouraged to go above and beyond to make sure that customers are happy.

Zappos started the program by testing it with a small group of customers and then expanding it to more customers based on the results.

The company is also constantly looking for ways to improve the program, and it is not afraid to make changes if necessary.

This has been very successful in improving customer satisfaction, with a 2022 survey suggesting 96% of customers are satisfied with the service they receive.

Zappos' test and learn approach to customer service has helped the company to become one of the most customer-centric companies in the world.

It has received numerous awards for its customer service, including the 2022 J.D. Power Customer Service Award for Online Retail.

8. EMBED THE RIGHT THINKING

Having a customer-centric business strategy is great, but it only truly drives customer engagement when the whole organisation believes and lives that ethos.

World-class businesses are all about providing great experiences for their customers. This mindset permeates every level of the organisation, from the front lines to the back office.

These businesses embed their customer-focused vision and strategy into their culture so that it influences everything they do.

They recruit and retain the right people who are passionate about their vision and values, and they empower their teams to do what's right for the customer.

Ultimately, every business decision and customer interaction is framed in the context of how it aligns with the vision and delivers the strategy.

In essence, these businesses' ethos is their competitive edge in the marketplace. It's what allows them to maximise the opportunity to engage their customers.

"If we were motivated by money, we would have sold the company a long time ago and ended up on the beach."

Larry Page
CEO, Google

IKEA is known for its affordable, ready-to-assemble furniture and a reputation for great customer service, which is down to its ethos.

IKEA takes a comprehensive approach to ensuring their employees live customer-centricity through formal training and encouragement.

This training equips employees with the knowledge and skills needed to provide excellent service, such as how to greet customers, how to answer questions, and how to resolve complaints, and the product features, benefits, and uses.

Employees are rewarded and recognised for going above and beyond in meeting the needs of customers.

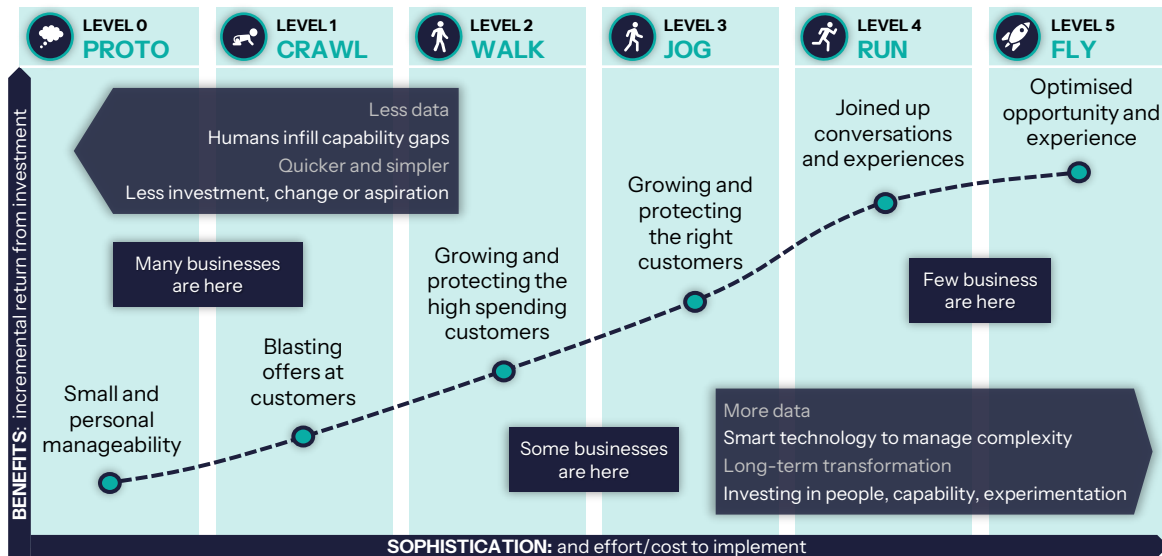
Employees are empowered to make decisions that are in the best interests of customers without having to get higher approval.

Feedback is collected from customers and employees on a regular basis and used to identify areas where the company can improve its service.

This positive and supportive work environment ensures employees feel valued and appreciated by the company and more likely to want to go the extra mile for customers.

As a result, IKEA employees are committed to providing excellent customer service to meet customer needs and contributing to company success.

IT'S AN EVOLVING JOURNEY



CONSIDERATIONS FOR IMPROVEMENT

EVOLUTION CAN BE DISJOINTED

Organisations can be at different levels of maturity in different areas of customer management. E.g., a business may be at level 1 for its customer data collection and analysis capabilities, but it may be at level 3 for customer service capabilities.

THE RIGHT DATA IS FUNDAMENTAL

Data must be collected consistently and reliably, and then analysed and acted upon to improve customer management. It should ideally include customer purchasing history, contact information, demographics, usage behaviour, channel activity, history, interests, preferences and feedback.

BUSINESS SIZE AFFECTS PROGRESS

Smaller businesses can evolve to higher levels of maturity more quickly with less capabilities but are less likely to have resources. Conversely, larger organisations may have budget but need more sophisticated tools and to evolve more slowly along the journey to ensure alignment.

SOME SECTORS HAVE (DIS)ADVANTAGES

Similarly, some sectors such as retail and financial services, are inherently more customer-centric. Whilst they may have a head-start along the journey, there is often more legacy capabilities and thinking that can make evolving more difficult.

CHARACTERISTICS OF BUSINESSES AT LEVEL 0

SUMMARY

Small and personal manageability

OBJECTIVES

Driven by personal manageability within a small business so, KPI are more a result rather than ambition and are typically measured in total revenues and costs.

SUCCESS

Critical as the business lives and dies on the quality of its proposition and the team delivering it, plus a healthy dose of luck. The challenge is that it's very difficult to scale without diluting the passion and expertise and creating unintended complexity.

HIGH SATISFACTION

Fewer customers, simpler product/ service makes it easier to wow.

HIGH MORALE

Employees feel closer to heart of the business and its mission.

LOW SALES

Ability to deliver and manage growth restricts scale.

LOWER CHURN

Customers feel looked after due to small size of business.

GOOD REPUTATION

Only among customers in the know.

LOWER COSTS

Fewer customers to support with basic systems and processes.



SALES

Pushing product
 Competitor differentiation
 Offers incentivise purchase
 Social media, influencer marketing,
 simple email
 Largely unknown audiences



SERVICE

Purely reactive
 Simple customer issues
 Satisfaction through product/service
 Minimal aftersales needed
 Small team invested in support
 Lacks process/tools to do more



OPERATIONS

Small scale
 Led by the original creator/founder
 Simple propositions
 Small range of product
 Few, easily managed customers
 Customer governance is intuitive



PEOPLE

Passionate team
 Multifunctional generalists
 Ad-hoc training is hands-on and
 need-to-know
 Too busy to spend time on process
 Minimal understanding of impact of
 any action on customers



CRM

Rudimentary contact details
 Heavy reliance on generic tools like
 Excel for capturing and storing
 customer sales data



DATA AND INSIGHT

Negligible market information
 Experiential knowledge in heads
 Limited customer information
 Measurement of sales, revenues
 and overall costs is based on the
 company's accounts, or tracked
 using Excel

CHARACTERISTICS OF BUSINESSES AT LEVEL 1

SUMMARY Blasting offers at customers

OBJECTIVES Fast growth. KPI are focused on the number of new customers and total sales revenues to drive market share, supported by blasting offers at almost anyone.

SUCCESS Mostly luck and at the whim of external factors such as product quality, uniqueness, utility, the economy, etc. It's hard to measure and attribute performance, and difficult to repeat specific successes as there are no structured processes to learn and adapt.

LOW SATISFACTION

Customers not receiving expected level of service.

LOW MORALE

Employees frustrated and overwhelmed by complaints.

LOW SALES

Customers don't return to purchase from the business.

HIGH CHURN

Customers dissatisfied with product or service and seek alternatives.

POOR REPUTATION

Customers share negative experiences with others.

HIGH COSTS

Business spends more on support and resolving issues.



CRAWL



SALES

Product-push
 Driven by latest demands
 Financial incentives to purchase
 Basic blast email, ad-hoc phone outreach, and social media tools
 Largely unknown audiences



SERVICE

Highly reactive
 Support inconsistently applied
 Lucky presence of business heroes elevates customer experience despite the systems



OPERATIONS

Products and services work OK
 Sometimes development is over-budget and late
 Just starting a data-driven journey
 Poorly equipped for customer need
 No customer governance



PEOPLE

Generalists adapting to specialisms
 Independent functions
 Collaborating
 Ad-hoc hands-on training
 Minimal understanding of customers
 General frustration with capabilities



CRM

Rudimentary systems to store data and track customer interactions
 Largely unused due to veracity or accessibility of the information
 Heavy reliance on generic tools like Excel for capturing data



DATA AND INSIGHT

No hard data or insight on market or customers, or their needs
 Information limited to transactions
 Ad-hoc research, no enriched data
 Basic reporting, limited to sales and revenue, mostly through Excel

CHARACTERISTICS OF BUSINESSES AT LEVEL 2

SUMMARY	Growing and protecting high spending customers
OBJECTIVES	Focus on the customers that spend the most so, KPI are set to target the value of sales, value of revenue retained and the cost of doing business.
SUCCESS	Good from repeating the same activities, but it's starting to reduce as customers become used to the same propositions and offers. The business is learning from observation, but not from empirical analysis.

RISING SATISFACTION

Feedback starting to improve experience and satisfaction.

RISING MORALE

Employees partially empowered to resolve & improve experiences.

RISING SALES

Customers more satisfied and likely to repeat purchase.

REDUCING CHURN

Customer concerns being addressed and reducing churn.

RISING REPUTATION

Resolving issues results in less negative experiences shared.

REDUCING COSTS

Resolving issues is more systematic and cost efficient.



WALK



SALES

Pushing product
Internal competition for access to customers in campaigns
Generic offers incentivise purchase
Basic list selections for email and voice-call outreach
Targeting based on purchase history



SERVICE

Processes set up
Reactive to customer queries
Some structure around customer lifecycle, e.g. account opening
Customer interaction is possible through email, call and social media handling



OPERATIONS

Recognise high-level product or sales-tier segments
More focus on highest spenders and keeping them happy
Minimal customer governance
Customer-centricity is abandoned when business needs sales



PEOPLE

Starting to specialise
Unintentional functional 'siloes'
Training mostly on-the-job
Formalised regulatory requirements
Positive employee sentiment
Very frustrated with capabilities



CRM

Partially automated
Minimal integration
Manual interfacing between tools designed for managing customer interactions
Processes to manage development of customers are being conceived



DATA AND INSIGHT

General market understanding
Basic understanding of needs
Feedback and satisfaction data is actively sought
Customer data starting to be collected, enriched and analysed
Basic analysis tools, e.g. Excel

CHARACTERISTICS OF BUSINESSES AT LEVEL 3

SUMMARY Growing and protecting the right customers

OBJECTIVES Focus on the right customers with segment-level KPI targeting sales value, retained revenue, return on cost (to serve and of sale) by channel, satisfaction and engagement.

SUCCESS Enabled through broad understanding of what works and what doesn't with different segments. Outcomes are repeatable but offer and contact fatigue is noticeable with customer audiences, requiring new offers and comms to maintain performance.

BETTER SATISFACTION

More customer-centric and providing a better experience.

BETTER MORALE

Employees fully empowered to resolve & improve experiences.

BETTER SALES

Customers more likely to repeat purchase and advocate.

REDUCED CHURN

Better understanding of needs and issues and taking steps to address.

BETTER REPUTATION

Known for commitment to providing a better experience.

HIGHER COSTS

High investment in initiatives but offset by returns.



JOG



SALES

Product push, some driven by customer need
Offers incentivise sale/retention
Integrated programmes of propensity-driven campaigns
More complex targeting and management of campaigns



SERVICE

Well-defined processes
Integrated messaging
Most lifecycle processes are customer-centric
Agent conversations with customers introduce service and sales prompts
New self-serve tools being piloted



OPERATIONS

Recognise more valuable customers and with higher potential
Structured customer lifecycle
Developing customer governance
Customer are centrally 'owned'
Trialling new processes, campaigns and offers



PEOPLE

Specialised into 'siloes'
Functional boundaries create friction
Higher headcount in data management & science
Training on process and regulation
Positive sentiment, but still some frustrations with systems



CRM

Fully automated
Mostly integrated system
Structured data collection
Fixed journeys meet 'regular' needs
Digital content personalisation
Tools are mostly competent



DATA AND INSIGHT

Knowledge of market & customer
Customer needs, behaviour, and propensity understood
Data manipulation & analysis tools
Specialists access customer data
Improvement principles in most activities

CHARACTERISTICS OF BUSINESSES AT LEVEL 4

SUMMARY Joined up customer conversations and experiences

OBJECTIVES Based on strategy segments each with different objectives and focus on engagement, maximising relevance and driving improvement in Customer lifetime value (CLV).

SUCCESS Driven by understanding which activities work best with different audiences. Results repeatable, but uplift dependent on market conditions, offer and message, meaning continuous test & learn is essential to maintain performance.

HIGH SATISFACTION

Analytics personalise customer experience and deliver needs.

HIGH MORALE

Empowered to use data and analytics to improve experience.

BETTER SALES

Customers more likely to repeat purchase and advocate.

LOW CHURN

Data and analytics identify and intercede potential leavers.

STRONG REPUTATION

Known for commitment to providing relevant experiences.

HIGHER COSTS

High investment in capabilities but offset by higher returns.



SALES

Balance between product push and customer needs-driven sales
 Tailored offers incentivise purchase, retention, loyalty
 Fully integrated customer contact planning across all channels
 Smart reactive and proactive sales



SERVICE

Tiered by customer strategy
 Omni-channel
 Proactive service messages and prompts for sales-over-service
 Self-serve tools, e.g. AI driven help, are already implemented



OPERATIONS

Customer-centric processes
 Standard journeys, e.g. onboarding, maintain a 'customer conversation'
 Productionising best practice
 Optimising customer processes
 Balancing customer vs commercial priorities



PEOPLE

Focused on segments
 Teams of cross-functional specialists fully aligned to their segment
 Training programmes onboard and refresh skills periodically
 Opportunities to up-skill
 Data science and experiment focus



CRM

Fully automated & integrated
 Customer experience management across all channels
 Orchestrated customer treatments
 Implement defined journeys, triggered opportunities and next best actions



DATA AND INSIGHT

Deep understanding of customers
 Accessible customer record
 Automated propensity build and monitoring
 Predict outcomes for actions
 Econometric forecasting informs business strategy

CHARACTERISTICS OF BUSINESSES AT LEVEL 5

- SUMMARY** Optimised customer opportunity and experience
- OBJECTIVES** Focus on future marginal profitability of each customer decision. Innovation, best practice, customer experience, engagement and reputation are all fundamental.
- SUCCESS** Driven by a forensic understanding of which activities work best with each customer and how it will impact performance. Outcomes are predictable and repeatable, but experimentation keeps pushing knowledge of the art of the possible in performance.

HIGHEST SATISFACTION

Constant innovation meets and exceeds customer expectations.

HIGHEST MORALE

Full empowerment. Competition to work in the business.

HIGH SALES

Customers won't defect so always repeat buy & recommend.

LOWEST CHURN

Constant innovation meets needs and discourages leavers.

STRONGEST REPUTATION

Well-known for innovation and ability to meet needs.

HIGH COSTS

Higher investment in ideas and capabilities offset by higher returns.



SALES

AI-enhanced tools automate and facilitate customer interactions
 Helping customers get the best value
 Optimised customer prices
 Real-time 1:1 offer recommendations
 Influenced by what's happening now as well as all stored knowledge



SERVICE

AI-enhanced tools to automate and facilitate customer servicing
 Helping customers get the best possible support
 Real-time 1:1 service prioritisation
 Recommendations influenced by real-time interactions and history



OPERATIONS

Continuously innovating ways to meet customer needs
 Experimentation, risk-taking and exploration of new ideas in efficiency and effectiveness
 Customer collaboration in design
 Creating best practice



PEOPLE

Focused on customer benefits
 Generate ideas and experiment
 Entrepreneurial mindsets contribute to profitability
 Specialist skills in multiple disciplines
 Focused training and development of business & personal effectiveness



CRM

Highly adaptive to easily pivot around opportunity & challenge
 AI-enhanced innovation and thinking
 Optimised experiences and messages using empirical data and AI
 Dynamically derived individual customer contact plans



DATA AND INSIGHT

Forensic understanding of customers and business activities
 Every decision & action is measured for incremental performance
 Embedded AI-enhanced tools
 What-if scenario planning explores benefit mix options

IMPROVING CUSTOMER MANAGEMENT

- 1. Know your customers.** What are their goals, needs, wants, and pain points? Use data to understand your customers and develop products and services that meet their needs.
- 2. Build awareness.** Do your customers know what your business is about? Why should they choose you?
- 3. Communicate regularly.** Let them know about new products and services and keep them updated on progress.
- 4. Be consistent.** Your brand positioning and message should be the same across all channels to help build trust.
- 5. Continuously enhance.** Don't think it is finished. Keep improving the quality of your products and services.
- 6. Be Patient.** Building relationships takes time. Don't expect overnight results.
- 7. Listen.** Feedback is important so, use it to improve your products and services, and fix problems quickly.
- 8. Personalise.** Your interactions with customers should use their name, remember their preferences, and use the context of their situation and behaviour.
- 9. Make it easy.** Your sales and service experiences should be easy to use.
- 10. Reward loyalty.** Loyal customers deserve recognition so, give them discounts, free stuff, or other perks.
- 11. Be proactive.** Don't wait for customers to come to you with problems. Reach out to them regularly to see how you can help.
- 12. Innovate.** Experiment and learn by trying new things to meet customer needs.

TIPS FOR EVOLVING CUSTOMER MANAGEMENT



PROTO



CRAWL



WALK



JOG

- Create a vision for managing customers.
 - Grow sales organically.
 - Explore new target audiences.
 - Evolve product and proposition.
- Raise awareness of the importance of aligned customer management across the business.
 - Develop understanding of customer needs and expectations.
 - Fix the fundamentals in terms of customer and employee challenges.
 - Implement core customer management initiatives, e.g. structured service.
- Start measuring customer satisfaction and other customer engagement metrics.
 - Identify areas where customer experience can be improved and prioritise development to enhance.
 - Develop and implement standard customer management processes

TIPS FOR EVOLVING CUSTOMER MANAGEMENT



JOG



RUN



FLY



- Fully embed a customer-centric culture across the business through KPI and behaviours.
- Embed data and analytics into the customer management decision-making process.
- Innovate to improve the end-to-end customer experience.

- Measure individual customer profitability and incremental impact of different opportunities.
- Start optimising individual customer activities to maximise segment objectives.
- Experiment with new capabilities and ideas to improve customer engagement and profit.

- Continuously experiment with new techniques and tools.
- Uncover new actionable insights and opportunities.
- Look at other sectors to spot opportunities to improve customer experience and wow customers.

THE SWEET SPOT OF CUSTOMER MANAGEMENT AMBITION

LEVEL 4 is a sensible and realistic ambition. It provides a foundation to fully understand customers, make informed decisions about how best to serve them and set the business up for success.

	 LEVEL 0 PROTO	 LEVEL 1 CRAWL	 LEVEL 2 WALK	 LEVEL 3 JOG	 LEVEL 4 RUN	 LEVEL 5 FLY
Sales						
Reputation						
Satisfaction						
Morale						
Churn	Low	Very High	High	Medium	Low	Very Low
Costs	\$	\$\$\$	\$\$	\$\$\$	\$\$\$\$	\$\$\$\$\$

THE CUSTOMER MANAGEMENT FRAMEWORK

Purpose

Set the corporate KPI and objectives and manage regulatory and business oversight.

People

Manage the skills, training, and development of teams driving and supporting the strategy.

Platforms

Manage the core data and enabling systems for customer management.

Customer Governance

Align all strategies, policies, systems, processes and data with business objectives.

Customer Strategy

Group similar customers by value and potential to set development objectives, e.g. which to retain.



Insight

Analyse customer behaviours to understand audience profiles, propensities and opportunity.

Proposition Design

Inform commercial proposition and enabling capabilities, e.g. product engine, pricing.

Treatments

Define principles for treating different customer groups, e.g. how to retain, contact parameters.

Service Design

Inform service capability design to implement treatments, e.g. levels, features, prioritisation.

Campaign Planning

Design outreach campaigns and reactive prompts to engage customers according to treatments.

Test & Learn

Incorporate analytical tests into all activity design to establish what works with different customers.

Sales CRM

Provide customer and portfolio summaries and recommendations to inform engagement & sales.

Service CRM

Provide customer summaries and reactive prompts to inform engagement and service.

Outreach Comms

Design activities informed by individual customer recommendations and personalisation.

Business Intelligence

Monitor operational performance through assisted and digital channels.

Operational Analysis

Analyse efficiency and effectiveness of activities and operations.

Customer Dashboards

Monitor high-level performance and trends against targets for the overall customer base.

IDENTIFYING YOUR STARTING POINT

What are the corporate strategic priorities?

Different priorities require different focus, e.g. revenue growth, market share, in-year profitability. Understanding these means better articulation and alignment of competitive goals and sharper, more comprehensive delivery strategies.

How well are customers understood?

Knowing how much each customer spends, why they do it, and forecasting their future behaviours and potential means identifying unrealised value and opportunity can be considered and prioritised.

How sophisticated is customer management?

Planning and orchestrating integrated outreach and interaction strategies as part of well-defined journey and lifecycle engagement programme, because every touchpoint is an opportunity for influencing customer thoughts, feelings and behaviours.

How is customer data being leveraged?

Capturing customer data, generating insight into behaviours, and translating that insight into actionable improvements to experience. Knowing which data is most valuable is crucial to success and enables journeys and experience to be enhanced at every touchpoint.

How sophisticated is customer personalisation?

Providing consistent, personalised experiences across channels to increase customer engagement. Anticipating and servicing customer needs through consistent and personalised interactions increases likelihood and frequency of purchases, and advocacy.

IDENTIFY OPPORTUNITY AREAS

1 MAP THE CUSTOMER LIFECYCLE

Map out the customer lifecycle to identify significant interaction points with the customer, e.g., from awareness through to churn. Prioritise based on overall customer impact.

3 DEFINE USE CASES AND REVIEW

Articulate what needs to be done differently to deliver change and identify gaps in people, processes, platforms, data, and project.

Check that use cases align to business priorities; address key business issues; satisfy stakeholder needs; and are realistically achievable.

5 GAIN BUSINESS CASE APPROVAL

Review viability and progress through internal approvals. If it's not approved, then either abandon or tweak it. Tweaking could include budget re-phasing or reducing non-essential costs.

2 MAP THE CUSTOMER JOURNEYS

Map out the journeys within each lifecycle stage to identify every potential interaction point with the customer. Ideate opportunities to positively influence customers at each stage.

4 DEFINE BUSINESS CASE AND REVIEW

Demonstrate project value and how it aligns to overall strategy. Articulate rationale and predicted commercial and operational benefits.

Check the business case aligns with corporate priorities; optimises cost allocation; delivers cost effective benefit, links benefits to KPI; delivers benefits early; and is backed by stakeholders.

ARTICULATE THE STRATEGY

Once the use cases are defined along with a strong business case, the next step is to bring them together into a coherent customer management strategy.

This strategy must deliver the vision and articulate the benefits in a way that resonates with stakeholders.

It requires a compelling story about why the proposed approach is important for success and what it will take to deliver.

There are three parts to a persuasive, fact-backed narrative that will give your customer strategy the best chance of being signed off.

STRATEGY

1. Identify the problem

What you're not currently doing and your current constraints to unlocking customer value.

2. Explain the solution

How and why you're going to address these issues and fill the gaps.

3. Articulate the reward

Reveal what returns lie in store for doing so, and over what timeframe.

The order in which these parts are delivered depends on the context of your pitch. E.g., an executive-level audience is time-short, mentally juggling many issues, and tends to remember the first part of information presented to them so, start with the rewards.

The story should include:

- Alignment of corporate strategy and customer management strategy
- Why customer value can't be fully exploited today
- What transformation will mean in terms of capability and benefits
- Risks, and how they can be mitigated to protect the benefits
- Costs and challenges being fully recognised from all areas

EXAMPLE: ENERGY SUPPLIER

A leading energy company needed a completely new customer management strategy. From talking with the key stakeholders, it was clear that there were lots of ideas to increase customer value, but data was holding them back.



To ensure buy-in for the strategy, a case was structured to emphasise the data elements that would need fixing to unlock customer value, such as improving data quality and creating a 360 view of customers. The cost saving benefits were emphasised as much as the revenue potential, as cost saving was a strategic priority at the time.

By articulating the strategy from this perspective, it stood a greater chance of getting the project approved and could then deliver the campaigns to achieve the ROI that other stakeholders were focussed on. If done the other way around and presented all the ideas before the data benefit, buy in may not have been forthcoming.

The approach worked the company moved forward with their customer management strategy, delivering the benefits of the new data capabilities and enabling many of the ideas for increasing customer value.

EXAMPLE: GAMING BUSINESS

A large gaming company wanted to convert anonymous online players to known, registered players to increase marketing opportunity, but as the use cases were developed, it became clear that the primary benefit could instead come from personalising the experience of the anonymous players rather than focussing on the registration process.

Delivering this change would involve a larger project of process changes, within both the digital and commercial teams, as well as changes in technology to enable the personalisation into the anonymous player base. This meant key stakeholders needed to be bought into this change in approach.

To help them understand and get buy-in, the strategy was articulated in terms of the additional return the business could get from current players, explaining why this was of greater benefit than the original assumed goal of driving player sign-ups.

This became a much stronger – and ultimately successful – strategy and was unanimously approved by the key stakeholders.



CREATING A ROADMAP FOR CHANGE

ARE ALL STAKEHOLDERS ALIGNED?

Make sure everybody involved with the project is clear on its aims, timeframes and expected outcomes.

CAN THE CHANGE BE DELIVERED AS BITESIZE PROJECTS?

Early successes add significant momentum to a project as stakeholder confidence and benefit increases. Prioritise these bitesize pieces in the right sequence to satisfy the key stakeholders.

WHAT ARE THE TIMELINES AND DEPENDENCIES?

Set deadlines for each stage of the project and map out what needs to be done before each activity can begin.

WHAT ARE THE RISKS AND ISSUES?

Identify anything that could hold up the delivery, such as unproven technology or lack of resources, and put adequate mitigations in place to avoid or minimise them.

HOW DO YOU MEASURE THE CHANGE?

Set KPIs and keep everything focussed on delivering the benefits set out in your business case.

HOW TO DELIVER CHANGE

In today's dynamic environment, change is no longer an exception; it's the norm. Whether it's implementing new technology, cultural shifts, or mergers, change is part of "business as usual."

When delivering a major change programme, it's important to minimise impact to core operations so, consider phasing project work around existing processes and workflows to minimise risk.

It is always better to have some of an existing team on the project, ideally in a full-time capacity. This gives opportunities for learning about the change during the project, share its progress with the wider organisation, and be ready to hit the ground running once it's completed.

Internal colleagues also have insights into the organisation that will be invaluable to decision-making throughout the delivery. A good example of this is including a resource that is usually customer-facing on the project team to represent the end customer.

The key question is: "how do I free internal resources up from their day-to-day activities to work on the project?" If they have full-time involvement then, e.g. back-fill with other internal resources or with external support. If only part-time, block out diaries to ensure sufficient focus is given to the change project and BAU duties, and to manage availability expectations with their colleagues.

INTERNAL OR EXTERNAL RESOURCES?

For some of the workstreams in your change programme you should be able to deliver using only internal resources with the relevant skills, but for others, additional external expertise may be needed to provide specialist skills.

Understanding this will help you plan the relevant workstreams, identify where you may need specialist support and ensure project budget is allocated effectively.

Don't outsource the whole delivery in the belief that this will be easier to manage – often the opposite is true and more likely to result in a loss of control of budgets, deadlines, and – most importantly – business as usual ownership.

Having an aligned team of internal and external experts is the best way to retain control. If you hire consultants to help you deliver the strategy, it's better if your team owns the key roles on the project and the consultants provide advisory and delivery bandwidth, rather than them taking care of everything.

This will ensure you have line of sight across the project, can catch issues or potential 'scope creep' before they arise, and ultimately be in a better position to fix things when they go wrong.

TRANSITION TO BUSINESS AS USUAL

Handing over a new capability to a team to run in BAU should be easy, but some businesses who've finished major change projects don't get the expected results or worse, a poor handover has led to performance going down, not up.

Failure to plan for BAU transition or a creeping overreliance on a delivery partner can leave organisations beholden to an outsourced team or services contract in BAU, significantly enhancing the total cost of ownership.

To avoid this, ensure 'people' is one of the top priorities for the project and answer these 3 questions:

1. Who will take ownership for this system/programme/initiative after the project has finished?

Start with the end in mind. Do you know which part of your business will own the system/ initiatives/ programme after it's finished?

Will you use an existing team, or do you need to create a new one? If it's a new team, who will they report to, how will they be measured, and what other teams will they impact?

TRANSITION TO BUSINESS AS USUAL

2. Do you have the internal capability and capacity to maximise the benefit of this in BAU?

To understand this requires an audit and gap analysis of existing resources about their skills, knowledge and available capacity to fit new activity into their current workload.

If it's a newly formed team, what impact will their introduction have on other teams, and will it require backfilling of roles or activity to accommodate them?

3. Will you need to increase the size of the team to manage this additional activity?

Do you need to grow the team to accommodate the required skills or capacity? Some skillsets are specialist and finding internal resources capable of picking them up in parallel with their day job can be extremely challenging so, you may need to hire somebody else for the additional work.

With marketing and data technology particularly, different platforms require different skills, so ensuring you have the right skills in place for go-live can be the difference between the success or failure of your project.

TYPICAL ROLES AND RESPONSIBILITIES



Chief Customer Officer (CCO)

Oversees all company-wide customer-focused culture and activities, and prioritises resources.



Director of customer strategy / customer experience / customer

Shapes, steers and prioritises customer strategy and experiences according to the overall objectives.



Head of sales / acquisition / growth / retention / customer development

Prioritises and steers the day-to-day development and protection of revenue streams.



Head of Customer Experience / Customer Journeys / Customer Services

Prioritises and steers day-to-day improvement of customer experience through touchpoints and activities.



Segment Manager / Journey manager

Defines and manages development activities for groups of customers.



Customer Journey Analyst / Customer Experience Analyst

Designs, implements and monitors customer-centric processes to identify pain-points and opportunities.



Segment Executive / Decisioning Manager

Develops and executes customer activities and marketing campaigns using according to segment strategy.

ACCELERATING YOUR CUSTOMER MANAGEMENT

CVM People fuse innovative thinking with proven expertise to help companies realise value from their data and customer management capabilities. Our unique transformation to operation approach means we can fluidly provide specialist consulting expertise through to executive recruitment services that accelerate customer growth ambitions.

TRANSFORMATION	Strategic direction	Consulting	Expertise-as-a-Service	Executive Recruitment	OPERATION
	Identifying and designing the right customer management and insight capabilities for growth.	Selecting and configuring customer management and insight capabilities to meet your needs.	Adding time-boxed expert resources quickly to your teams to boost your delivery and operational capacity.	Hiring the right talent to build your team, knowledge and expertise for ongoing customer growth.	

CVM People has worked with brands such as Virgin Media, Santander, Experian, Centrica, Travelopia, Vodafone, Camelot, The AA, LGU+, Centrica, Berry Bros & Rudd. We also partner with vendors such as Adobe, Salesforce, Dynamics, SAS, HubSpot, SugarCRM, HCL Unica, Bloomreach, Creatio, Knime.

To discuss how we can accelerate your ambitions, please contact Karl.Dixon@CVMPeople.com





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