

CustomerBLISS

Connecting your Company for Customer Growth

The Reality Check Audit: The “To Do” List for Customer Leadership

Want to optimize the Reality Check Audit Impact?

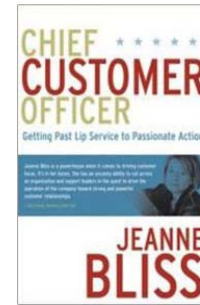
Get step—by-step guidance in the book:

Chief Customer Officer: Getting Past Lip Service to Passionate Action

What This Book Will Do For You

Discover what Memories and Experiences You Give Your Customers Today
Then Do Something about It!

You need to understand what drives the organization, how you work together, and how readily you can come together to solve the tough customer issue so you can deliver experiences customers DESIRE. You need to know if your metrics and accountability line up to mean anything significant about managing customer relationships. The answer to your situation may be naming a Chief Customer Officer, or it may not. This book will help you discover what the right answer is for your organization. Traversing it will lead you through four categories of information and decision making:



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JOSSEY-BASS™
An Imprint of WILEY
Now you know.

Breakthrough Concepts...

❑ Effect of Silos on Customer Experience Delivery.

The more likely customers have to navigate through separate corporate agendas just to get 'served,' the more likely they are to leave.

❑ Guerrilla Metrics.

Metrics necessary to power 'customer' into your boardroom and strategy.

❑ The Power Core

Where to begin to get the traction you need on transforming your company to becoming a 'customer' company.

❑ The Customer Leadership Organization.

Where in the organization will get the most traction? The Role of the Chief Customer Officer or Customer Leader.

❑ Making Customer Profitability the Priority of CEOs and Boards.

Attributes and actions – the platform and roadmap that succeeds.

Hearing Lip Service or Seeing Action? How Much Work Is Ahead?

The Reality Check Audit: The “To Do” List for Customer Leadership

Hearing Lip Service or Seeing Action? How Much Work is Ahead?

Frequently, the most challenging part of this work is managing expectations about the scale of the work to unite the company to manage customer relationships and profitability. Then there's the matter of gaining alignment about just how much you've done and how much there is left to do.

The Reality Check Audit will help you with this challenge. It is comprised of 56 questions covering seven dimensions necessary to build a customer ecosystem inside your corporation and business. These dimensions are:

1. Leadership
2. Customer Listening
3. Metrics
4. Accountability and Taking Action
5. Unified Customer Experience
6. Enabling Service Delivery
7. Motivation and Recognition

The Reality Check Audit: The “To Do” List for Customer Leadership

Is Your Leadership Driving Customer Loyalty and Profitability?

What defines your ‘brand’ for customers is the culmination of their experiences with you; your messaging both internally and externally, and how customers and the public interpret your company’s focus and truth in delivering what you say it stands for.

This proposition is tested everyday through every customer interaction you have with your customers.

Leading your company to focus on customers as the source of its long term profits requires specific actions, attitudes and accountability that makes it clear to the organization how they need to perform. It requires the power of leaders and the organization to understand that ‘brand’ is more than marketing spin...that it must permeate operations, the call center, fulfillment, the sales channel and every department and person in the organization.

The Reality Check Audit provides you with a quick litmus test to provide an understanding of the scope of work ahead.

And it indicates your current efforts in comprehensively leading and managing your brand and the profitability of your customer base.

A Summary of the Seven Categories of the Reality Check Audit

1. **Customer Profitability Leadership** – How are you managing customers as the asset of your business? How clear is your vision of the brand value you want to deliver to customers? How does the organization understand and translate your leadership into action?
2. **Customer Listening** – The importance and rigor in which you incorporate the Voice of the Customer into planning and delivering your customer experience.
3. **Metrics** – How the company uses metrics to manage the experience, drive accountability, build profitable customers and ensure the optimum experience is delivered to customers.
4. **Accountability and Taking Action** – The level of reliability you have created in holding people accountable for customer profitability. How the company makes decision making impacting customers.
5. **Unified Customer Experience** – How you work as an organization in defining the customer experience, translating it to a reliable operating plan and managing accountability in experience delivery.
6. **Enabling Service Delivery** – How well the organization prepares and enables customer-facing personnel to deliver the best experience to customers.
7. **Motivation and Recognition** – How the company reinforces and inspires the organization to be accountable and deliver the best experience to customers.

You should remember that the data provided by this diagnostic activity will only be valid and useful if you are as honest and accurate as possible and focus on what you perceive to be true at the present time and not what you might or should say if things were where you believe they will be in the future.

The Reality Check Audit: The “To Do” List for Customer Leadership

2 Ways to Conduct the Audit

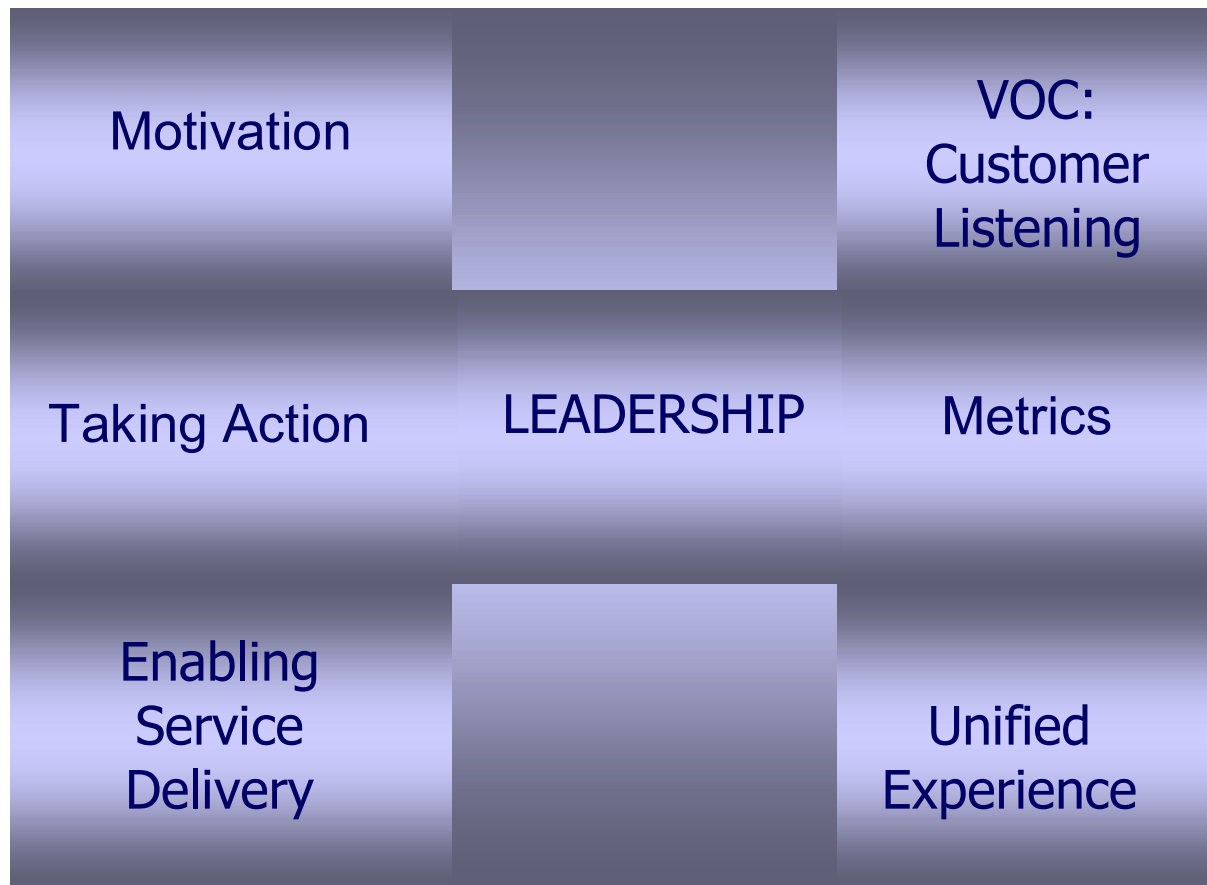
Distribute the Audit to Leaders and a Cross-Section of the Organization to Complete.

Use this option if you don't want to conduct the audit as part of a meeting. If you opt for this approach, set the stage for people to really take the exercise seriously. The audit should be sent ahead of time from the most senior customer champion in the organization – preferably the CEO or chief executive. There should be background on why it's being conducted, how people should be sincere in their responses and what is going to be done with the results. People have taken way too many of these things which have disappeared into the stratosphere with no follow-up. You need to really commit to working this audit, otherwise just don't do it! For this distribution option, the administrator of the audit would send out the audit, instructing people to fill out the “Your Company Overall” column. They would then collect the audits, tally up the scores and plot them for use in a meeting or other gathering where the results would be presented and discussed.

Have the Audit Completed During A Meeting Or Workshop.

I have seen this used as the jump-start for leaders taking ownership of driving the customer agenda. It's been beneficial in bringing the silos together to uniformly understand and agree to the scale of the work. And it's prompted great debate as people get into why perspectives vary on the performance of the different dimensions of the audit and customer leadership in the company. A great approach for using the audit in a meeting is to send the audit out to leaders ahead of the meeting so they can think about the content. They should evaluate both their personal actions in the “You as a Leader” column, as well as evaluate the entire company in “Your Company Overall” column. Prior to the meeting, also send the audit to a cross-section of the company, asking them to fill out the “Your Company Overall” column. Make sure you get the responses back from company members so you can compile their results and show how they respond compared to leadership responses. The differences will stir up great conversation and help to pinpoint priorities.

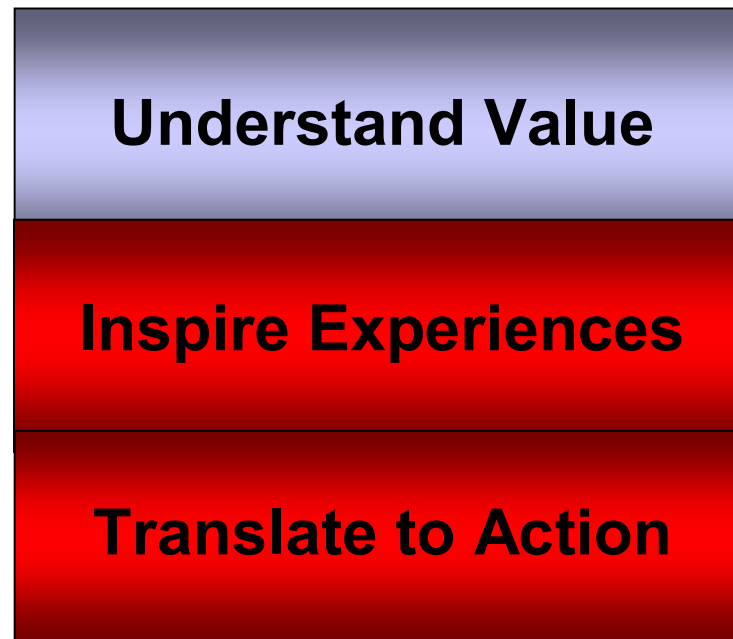
The Reality Check Audit Categories





1: Customer Leadership

Inspiration and **Clarity** of customer experience.
Focus on delivering a differentiated experience to the marketplace.



Reality Check Questions		You as a Leader				Your Company Overall			
		Strongly Disagree	Disagree	Agree	Strongly Agree	Strongly Disagree	Disagree	Agree	Strongly Agree
1. Leadership Vision Commitment	1. The organization is aware of what drives value to customers. You have prioritized your deliverables accordingly.	0	1	2	3	0	1	2	3
	2. People know customers by groups of profitability and loyalty.	0	1	2	3	0	1	2	3
	3. They are aware of what each customer group values most.	0	1	2	3	0	1	2	3
	4. You have clearly defined the tangible and intangible deliverables of your brand to customers and to your organization.	0	1	2	3	0	1	2	3
	5. You have a clear strategy - which everyone understands on how your brand can be differentiated in the marketplace.	0	1	2	3	0	1	2	3
	6. You have ensured that employees can internalize what your brand and desired customer experience is. They can translate how that vision & strategy impacts their job and performance	0	1	2	3	0	1	2	3
	7. Business decisions are based on driving customer value, and are clearly communicated inside the organization so people can internalize and role model the customer commitment.	0	1	2	3	0	1	2	3
	8. You continuously inspire people to think of ways to meet customer needs and elevate the customer experience	0	1	2	3	0	1	2	3
	Category Score								

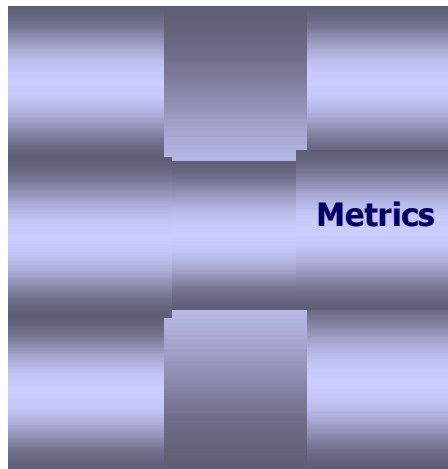


#2 VOC – Customer Listening

Your organization's **muscle for listening**, and level of **agility** in constantly knowing and responding to customer needs.

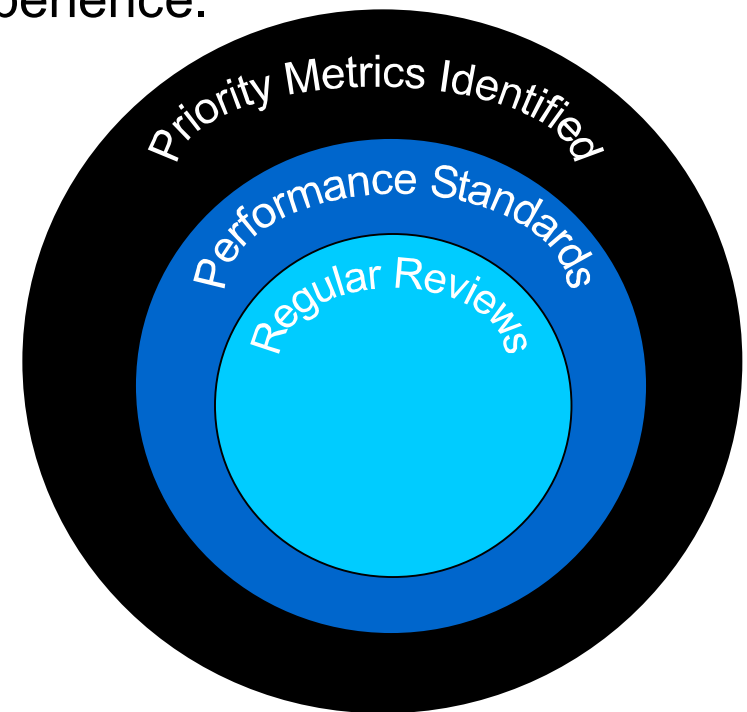


Reality Check Questions		You as Leader				Your Company Overall			
		Strongly Disagree	Disagree	Agree	Strongly Agree	Strongly Disagree	Disagree	Agree	Strongly Agree
2. Customer Listening	9. You have an easy mechanism for customers to give you real-time feedback. People can easily access & use information.	0	1	2	3	0	1	2	3
	10. You actively listen to customers and sponsor change to improve the customer experience.	0	1	2	3	0	1	2	3
	11. You listen to the frontline regularly to hear their experiences and perspectives on improving the customer experience.	0	1	2	3	0	1	2	3
	12. Customer complaints are welcomed, tracked and trended to resolve barriers to delivering the optimum customer experience.	0	1	2	3	0	1	2	3
	13. You use real-time data (comments/complaints) to know the pulse of the customer experience and make rapid change.	0	1	2	3	0	1	2	3
	14. Your survey system measures customer loyalty & retention and can be tied to operational changes required.	0	1	2	3	0	1	2	3
	15. You are able to segment your survey results by customer segment and in priority order for customers.	0	1	2	3	0	1	2	3
	16. You have a process to compile and use customer listening data to drive your annual planning priorities.	0	1	2	3	0	1	2	3
	Category Score								

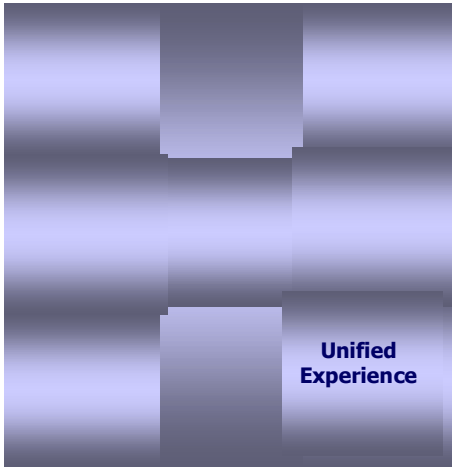


#3: Metrics

Across-silo metrics established and **constantly managed** to achieve the highest quality customer experience.



Reality Check Questions		You as a Leader				Your Company Overall			
		Strongly Disagree	Disagree	Agree	Strongly Agree	Strongly Disagree	Disagree	Agree	Strongly Agree
3. Metrics	17. You track the flow and quality of incoming and departing customers.	0	1	2	3	0	1	2	3
	18. You focus as much on retaining customers as you do in acquiring new customers and your metrics stress both.	0	1	2	3	0	1	2	3
	19. Tracking metrics trend customer feedback issues and their resolution with assigned accountability.	0	1	2	3	0	1	2	3
	20. The organization has a developed competency for identifying and managing process performance metrics.	0	1	2	3	0	1	2	3
	21. You have clearly established in-process metrics and performance standards for customer experience delivery.	0	1	2	3	0	1	2	3
	22. You have identified the priority customer interactions and track the process execution performance for these rigorously.	0	1	2	3	0	1	2	3
	23. You have connected metrics accountability across silos when multiple organizations take part in the experience delivery.	0	1	2	3	0	1	2	3
	24. You regularly hold reviews to gauge performance standard progress across operating areas and customer experience.	0	1	2	3	0	1	2	3
	Category Score								



#4: Unified Experience

Ability of the organization to **work together** to create and deliver a **cohesive** and **optimum** experience to the customer.

Create a holistic experience



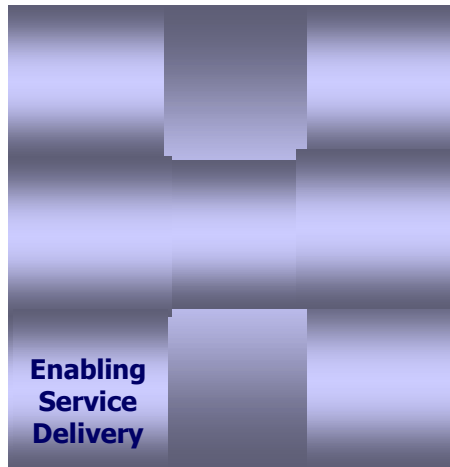
Across the Customer Lifecycle



Between the Silos



Reality Check Audit Questions		You as Leader				Your Company Overall			
		Strongly Disagree	Disagree	Agree	Strongly Agree	Strongly Disagree	Disagree	Agree	Strongly Agree
4. Unified Customer Experience	25. You have established a customer lifecycle or continuum that the organization understands to define the customer experience.	0	1	2	3	0	1	2	3
	26. There is a clearly known performance objective for each stage of the experience.	0	1	2	3	0	1	2	3
	27. You know the contact points with the customer and can identify high priority contacts for delivering brand value and keeping profitable customers.	0	1	2	3	0	1	2	3
	28. The organization works together to develop experiences along the continuum to define your brand	0	1	2	3	0	1	2	3
	29. You have a process map for key interactions or “moments of truth”, each with clear performance standards.	0	1	2	3	0	1	2	3
	30. The organization is clear about dependencies, hand-offs and performance accountability across operational boundaries.	0	1	2	3	0	1	2	3
	31. You organize company communication, performance reports and improvement efforts around the customer experience.	0	1	2	3	0	1	2	3
	32. You conduct an annual “moment of truth” audit which summarizes the total customer experience, operational hand-offs, current performance and improvement required.	0	1	2	3	0	1	2	3
	Category Score						60		



#5: Enabling Service Delivery

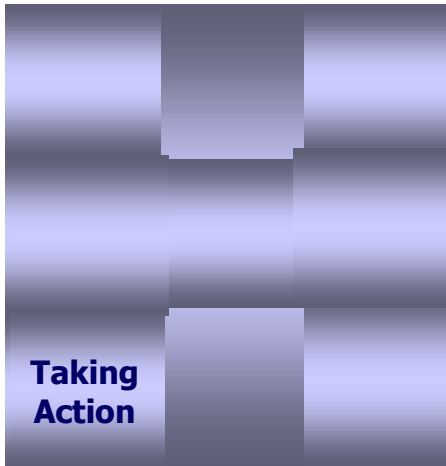
How the frontline is treated, regarded, prepared and enabled to deliver the optimum experience to customers.

Support to the Frontline...



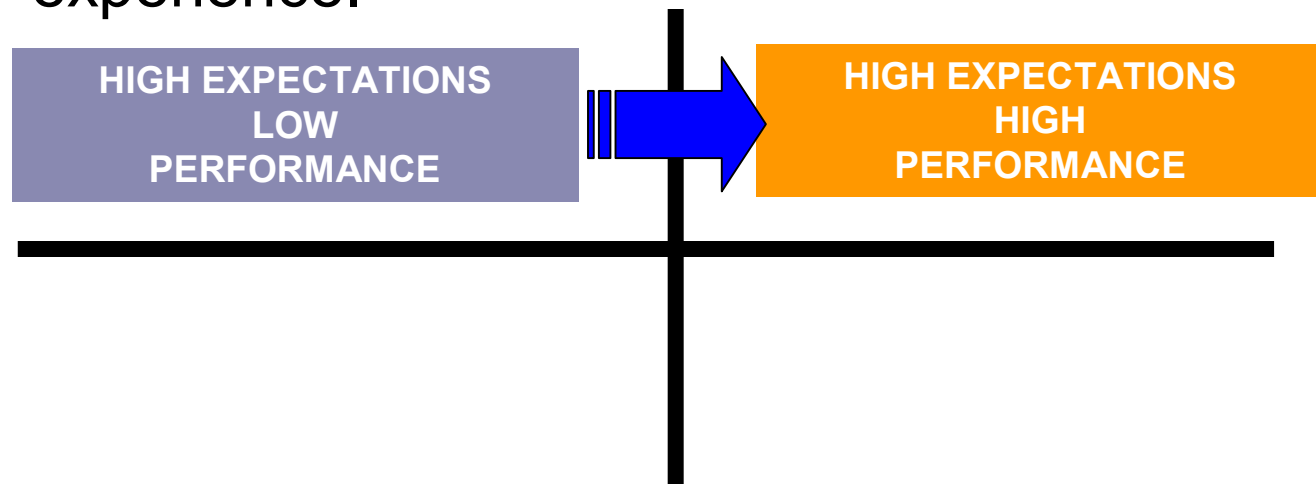
Role Clarity	Skills	Listening	Participant	Data

Reality Check Questions		You as Leader				Your Company Overall			
		Strongly Disagree	Disagree	Agree	Strongly Agree	Strongly Disagree	Disagree	Agree	Strongly Agree
5. Enabling Service Delivery	33. Service Providers have clarity on the role they play in delivering the customer experience.	0	1	2	3	0	1	2	3
	34. Service values are well communicated, understood and translated to performance standards and in objectives.	0	1	2	3	0	1	2	3
	35. You regularly listen to frontline personnel to understand and remove the barriers they face in service delivery.	0	1	2	3	0	1	2	3
	36. Skill development and training are provided to elevate service.	0	1	2	3	0	1	2	3
	37. Service providers are provided with the tools for efficient and effective interactions with customers.	0	1	2	3	0	1	2	3
	38. Service providers are able to identify high priority customers during their service interactions.	0	1	2	3	0	1	2	3
	39. Customer data connecting all of the customer interactions is provided to customer facing personnel so they can manage and understand the comprehensive customer relationship.	0	1	2	3	0	1	2	3
	40. Service providers participate in the development of the customer experience.	0	1	2	3	0	1	2	3
	Category Score								

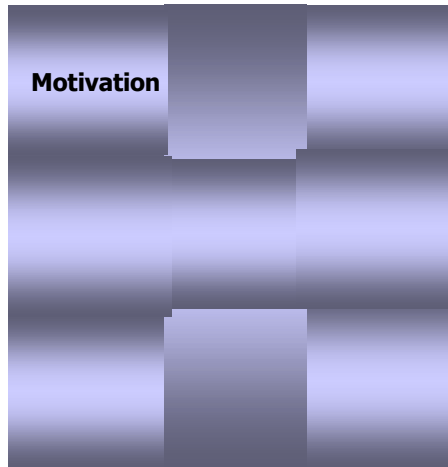


#6: Taking Action

The organization's **bias for driving change** to improve the customer experience.



Reality Check Questions		You as a Leader				Your Company Overall			
		Strongly Disagree	Disagree	Agree	Strongly Agree	Strongly Disagree	Disagree	Agree	Strongly Agree
6. Taking Action	41. Everyone can access an easy to understand reporting tool which pinpoints necessary changes and drives continuous improvement.	0	1	2	3	0	1	2	3
	42. You strategically engage the organization in building value added experiences for high profit customers.	0	1	2	3	0	1	2	3
	43. You have processes in place to continuously engage high value customers who have a propensity to defect.	0	1	2	3	0	1	2	3
	44. You run quarterly and annual “loss reviews” of who left and why and make improvement to remove the cause.	0	1	2	3	0	1	2	3
	45. You have an active process for reactivating profitable customers.	0	1	2	3	0	1	2	3
	46. There is a company-wide process that is seamlessly executed for poor service recovery.	0	1	2	3	0	1	2	3
	47. Customer service performance is tracked and measured over time.	0	1	2	3	0	1	2	3
	48. There is a sound system in place for ensuring that the same customer problem does not re-occur again.	0	1	2	3	0	1	2	3
	Category Score								



#7: Motivation & Recognition

How **customer focus**, **innovative thinking** and **collaboration** are motivated and recognized to foster optimum experience delivery.

Understand Value

- Customer Listening
- Frontline Participation

Inspire Experiences

- Collaboration
- Innovation

Translate to Action

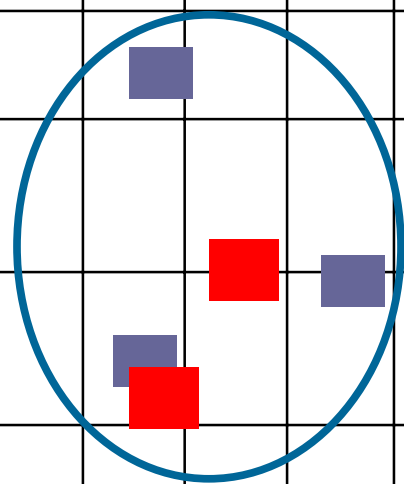
- Experience Metrics
- Lost/Gained Customers
- Quarterly Issues

Reality Check Questions		You as a Leader				Your Company Overall			
		Strongly Disagree	Disagree	Agree	Strongly Agree	Strongly Disagree	Disagree	Agree	Strongly Agree
7. Motivation and Recognition	49. Incentives, reward and recognition include focus on customer retention and profitability performance.	0	1	2	3	0	1	2	3
	50. You highlight the behavioral/transactional information in your database to show how customers respond to your efforts.	0	1	2	3	0	1	2	3
	51. Your reward and recognition reinforces and drives behavior to make continuous improvements.	0	1	2	3	0	1	2	3
	52. Your current performance framework measures those dimensions most critical to delivering your differentiated brand value.	0	1	2	3	0	1	2	3
	53. You provide ongoing real-time recognition for efforts true to your brand and customer experience delivery.	0	1	2	3	0	1	2	3
	54. You reinforce the development of innovative customer experiences and recognize ideas throughout the company.	0	1	2	3	0	1	2	3
	55. You reward cross-group collaboration excellence in delivering customer experiences.	0	1	2	3	0	1	2	3
	56. You bring together a group of customers on an ongoing basis to provide feedback and counsel to the company.	0	1	2	3	0	1	2	3
	Category Score								

Examine Your Organization- Toolkit

Have everyone in your organization complete the audit. Compile and map results. Use the insights to prompt discussion and work across the company and among Leaders for improving the customer experience culture in your organization.

	0	2	4	6	8	10	12	14	16	18	20	22	24
1. Leadership, Vision and Commitment													
2. Customer Listening													
3. Metrics, Performance Standards													
4. Unified Customer Experience													
5. Enabling Service Delivery													
6. Taking Action													
7. Motivation and Recognition													



Leader Assessment of Performance
 Company-wide Assessment of Performance

Examine Your Organization- Toolkit
Chart Your Results Here!

Have everyone in your organization complete the audit. Compile and map results. Use the insights to prompt discussion and work across the company and among Leaders for improving the customer experience culture in your organization.

	0	2	4	6	8	10	12	14	16	18	20	22	24
1. Leadership, Vision and Commitment													
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6. Taking Action													
7. Motivation and Recognition													

Leader Assessment of Performance

Company-wide Assessment of Performance

Examine Your Organization- Toolkit: **Where Are You NOW?**

Category	Reasons for Less-than-Great Customer Performance		
	Lack of Focus Not a Company Priority	Disjointed Efforts Everyone Does Their Own Thing	Lack of Clarity Not Sure What to Do or How or When to Do It
Leadership and Accountability for Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
VOC: Customer Listening:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic Customer Metrics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taking Action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unified Customer Experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enabling Service Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motivation, Recognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Who ELSE led the charge for customers Inside 5 major US Corporations?



Coaching by Jeanne Bliss

Take 1-2 Years Off Your Learning Curve!

Jeanne Bliss helps leaders get the customer on the **strategic agenda**, redirecting priorities and creating transformational changes to the brands' customer experience. She has driven achievement of 95 percent loyalty rates, changing customer experiences across 50,000-person organizations.

Jeanne's passion for customers is a blend of her Italian heritage and the serendipitous circumstances which brought her to **Lands' End, Inc** in the Wisconsin farmlands in 1983 where she reported to the company's founder and executive committee as leader for the Lands' End customer experience. She was Senior Vice President of Franchise Services for **Coldwell Banker** Corporation. Jeanne served **Allstate** Corporation as its chief officer for customer satisfaction & retention. She was **Microsoft** Corporation's General Manager of Worldwide Customer & Partner Loyalty. At **Mazda** Motor of America she initiated the brand's customer retention effort.

Now running CustomerBLISS, Jeanne coaches leaders to wrap their company's focus around customers and customer profits.

www.customerbliss.com

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Keynotes by Jeanne Bliss

Make Your DNA Revolve Around Customers. *Connecting Your Silos for Customer Growth*

"Customer" companies have a remarkable capacity to blend agendas across the organizational silos to deliver a coordinated and meaningful experience to customers. Most companies want to get there. Few arrive at the destination. Jeanne Bliss puts her 25 years as customer leader to work to help you find the right path for your organization. Audiences receive practical advice and actions and ideas for how to reset how they work together to make customers the priority of the business.

The 5 Habits of Beloved Companies

Beloved companies transcend the regular practices of commerce and create an emotional connection with their customers. In this keynote, learn the 5 habits that set the beloved companies apart. Learn how they use them actively to define the intent and motivation of your business. Filled with examples of the companies that customers love and employees love being part of; this keynote gives you a lens through which to compare and contrast your organization's purpose and intent for your customers. With its customized content, it gives you a kick-start to understand where you excel and where the work lies inside your organization.

Deliver Experiences Customers *DESIRE!*

Using her background as one of the architects of the Lands' End customer experience, Jeanne Bliss builds a customized presentation using your existing customer experience; examining it through her lens of customer desire and memory creation. She then prods the audience to evaluate, probe and deliver the 'aha' of what it takes to move from the experience you're delivering today to one customers truly *desire*.

**Book Jeanne to speak:
www.speakersoffice.com**

760-603-8110

Coaching from Jeanne Bliss: The Customer Leadership Roadmap

