Creating Customer Intimacy—*Translating Insights into Action*

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Agenda.

- Introduction to Unisys
  - Who we are
  - What we do

- Customer Advocacy Program
  - Goals
  - Components
  - Technology enablers
  - Performance drivers

- Lessons learned
Unisys Corporation.

A worldwide leader in IT services and technology
2003 Revenue: $5.9 Billion

36,000+ Employees working in more than 100 countries
Focused Industries & Competencies.

5 Global Industries
- Financial Services
- Public Sector
- Communications/Media
- Transportation
- Commercial

5 Core Competencies
- Systems Integration
- Outsourcing
- Infrastructure Services
- Server Technology
- Consulting

End-to-end solutions in targeted industries
Our Beliefs.

7 Operating Principles

➤ External obsession
➤ Best or nothing
➤ Invent the future
➤ Be bold
➤ Team for speed
➤ Deliver or die
➤ Absolute integrity

Our Focus

➤ Customers
➤ Employees
➤ Reputation
Customer Advocacy Program: Goals.

Create a holistic view….

➤ Extend the scope of the CRM/sales experience to manage customer needs and expectations

➤ Turn customer insights into meaningful information to drive proactive improvement of the total customer experience

➤ Ensure that customer intelligence is an integral part of business decision making - an “outside in” approach

➤ Provide a dynamic, user friendly, integrated problem escalation process that can be invoked by Unisys personnel--anywhere, anytime

...Become the “Voice of the Customer”
Customer Advocacy Program.

2002 ITSMA* Diamond Award

“…the Unisys Customer Advocacy Program leverages an integrated set of processes and tools to drive continuous worldwide improvement in customer satisfaction and loyalty. By integrating satisfaction, loyalty, and advocacy data directly into account management, Unisys takes a proactive approach to strengthening individual relationships and maximizing customer impact. Executive commitment, significant investment in people and resources, and internal goal setting sustain company-wide commitment.”

*Information Technology Services Marketing Association
Integrated Program Approach.

- Customer Relationship Survey
- Customer Value Index (CVI)
- Hot surveys
- Customer Loyalty Improvement Process (CLIP)
- Management Escalation Systems
- Employee Recognition
Customer Relationship Survey.

Objectives

- Assess customers’ perception of the overall business relationship
- Serve as a communications vehicle outside of the day-to-day business relationship
- Measure partnership strength
- Improve the customer’s experience
- Enhance Unisys financial performance
Customer Relationship Survey.

Execution

- Centrally managed
- Coordinated via a worldwide survey council
- Customer targets represent 70-80% of revenue
- Globally deployed
- Focus on senior decision makers
- Web and phone survey methodology
Customer Value Index.

- Proven relationship between customer satisfaction levels and revenue growth
- Customer satisfaction alone is not a predictor of future business success
- In combination, satisfaction, loyalty and advocacy provide a powerful metric
- CVI model developed using actual Unisys revenue growth data
Customer Value Index.

“Only Record Customers That Give Us 5 out of 5”

- **Customer Satisfaction**
  - Important!
  - 25% of total

- **Loyalty** *(willingness to repurchase)*
  - 20% More Important!
  - 30% of total

- **Advocacy** *(willingness to recommend)*
  - 80% More Important!
  - Highest Impact
  - 45% of total

Measured on a 1000 point scale
Customer Value Index

- Dissatisfied - Neutral
- Satisfied - Very Satisfied
- Partnering - Loyal
- Committed - Advocate

Declining Market Share | Stable Market Share | Profitable Growth in Market Share and Revenue

Relatively Good | World Class

0 | 200 | 400 | 600 | 800 | 1000
Hot Surveys.

➢ Immediate notification to field personnel responsible for customer relationship
  • Question rating of 1, 2, or 3
  • Specific customer comments expressing dissatisfaction
  • General overall dissatisfied tone

➢ Worldwide Survey Council focal point for in-country activities
Customer Loyalty Improvement Process:

CLIP: Turning Knowledge into Actions

1. Understand customer’s survey responses
2. Confirm with customer
3. Develop action plans
4. Gain customer buy-in
5. Execute plans
6. Verify results with customer
A Pro-active Approach to Advocacy.

Sales Cycle

Determine Customer Requirements

Conduct Formal CLIP Review with Customer

Set Customer Expectations

Delivery Cycle

Review Customer Expectations

Understand Customer Response

Review Plan with Customer

Develop Action Plan

CLIP

Survey Customer

Execute Action Plan

Show Customer Results

Execute Action Plan

Set Customer Expectations

Determine Customer Requirements

Conduct Formal CLIP Review with Customer
Management Escalation Systems.

- WALERT (Worldwide Alert)
  - Web based
  - Multiple escalation levels

- WWCSR (Worldwide Critical Situation Resolution)
  - Managed by WWCSR Council
    - Chaired by Global Customer Advocacy
    - Senior management participation
    - Disciplined and structured process

- Root-Cause Analysis
Communications Plan.

- “Branded” program
- Integrated marketing and sales communications plan
- Continuous reinforcement—push/pull communications
- Global internal “hot-line” support
- Dedicated Customer Advocacy Web Site
Technology Enablers.

➤ Integration with CRM/SFA tools
  • Siebel serves as the “backbone”
    - Contacts
    - Survey data
    - Hot Surveys
    - CLIPS

➤ Automated management reporting
  • CLIP progress “push” reports
  • Survey response rate tracking

➤ Vendor real-time reporting system
  • Web based system
  • 24/7 access
Driving Behavior.

➢ “Top down” executive involvement
  • Monthly reviews
  • Proactive troubleshooting

➢ Accountability through performance
  • CVI targets in compensation
  • CLIP goals in individual performance plans

➢ Automated Siebel reports

➢ On-line tools, websites, formal training/Unisys University
Performance Excellence.

Employee Recognition Program

- Annual recognition of employees acknowledged by customer
- Certificates awarded at the corporate and local levels
- Encourages sales reps to be proactive “beyond the sale” and focus on the relationship versus a transaction
Lessons Learned.

- Senior management buy-in is key
- Changing company culture takes time
- Evolution, not revolution—*continuous improvement*
- Be flexible
- Use a team approach—*engage all stakeholders*
- Communicate and then some…
Unisys Commitment.

To achieve world class levels of customer advocacy by

• Listening to our customers
• Improving the value we deliver
• Building strong, enduring relationships with our customers …