



## Whirlpool Corporation Global Customer Loyalty

**Background:** Whirlpool wanted to change the appliance game from a “sea of white” at the retail outlet to “creating loyal customers for life”.

**Approach:** Customer Loyalty comes from experiences that influence attitudes and ultimately buying behavior. We did global customer research to quantify the following flow.



For two years, Bud led a global consulting team to “put the data to work”. The team partnered with Whirlpool to design and run workshops to generate customer centric initiatives; enter the best into the resource allocation process; then test, pilot and run the best of the best up to full scale.

**Output:** This project changed the way Whirlpool thought about its business – its customers became part of the product conversation, and Whirlpool’s continuing success.



Of the dozens of new initiatives, the best known was Whirlpool’s support for Reba McEntyre’s concert tour: Habitat for Humanity.

By highlighting Whirlpool’s “social responsibility” it raised customer loyalty, as well as increasing same store sales.

# Microsoft Europe Dashboard of Customer Metrics

## Background:

For decades, Microsoft collected customer satisfaction data and reported it against as a strategic measure known as Net Satisfaction Score. Microsoft Europe wanted to link this “annual steering of the boat” with “operational metrics”.

## Approach:

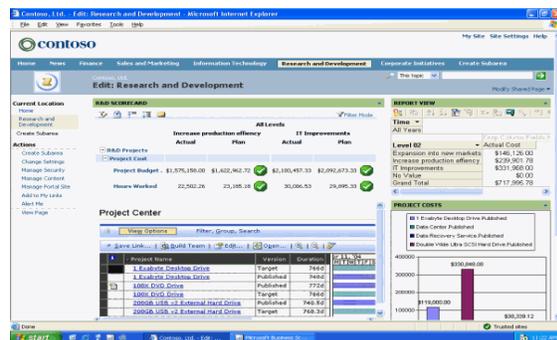
Bud led the research and consulting team for about 14 months. The first step was to connect driver touch points to customer loyalty – as illustrated in the following sample framework (not real information). This was done for major customer segments,



We then worked with Microsoft Europe to enter data, set goals, and work the reporting into “the rhythm of the business”. All of our work was documented in our “Dashboard in a Box” to allow the knowledge to be transferred among offices.

## Output:

Managers had the tools to connect their daily actions to the strategic goal of customer satisfaction. This was real time data delivered to their desktops using Microsoft’s Business Scorecard Manager.



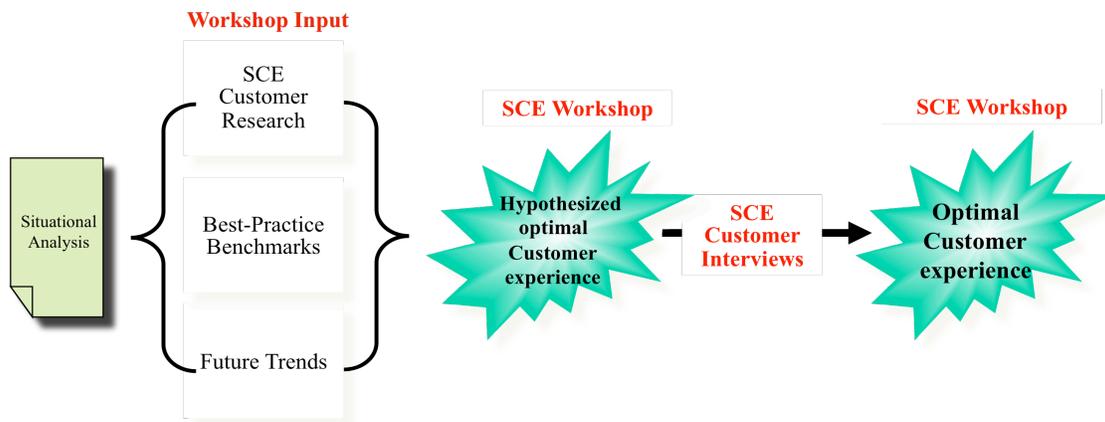
# Southern California Edison Market Strategy

## Background:

Southern California Edison is in the dynamic utility sector. To match market demands it is implementing major technology advances. SCE leadership wanted to ensure that these changes were implemented respecting the needs of its customers.

## Approach:

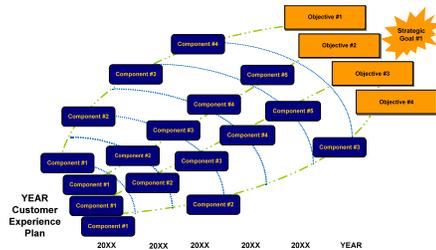
This was a four-month project that was highly participative. We worked with a core team under the direction of a Steering Committee; however, the key was a 40 person working team that was assigned homework and got together several times for full day working sessions.



The project started with a Situational Analysis and complete review of SCE research that had been conducted with customers.

## Output:

The team produced a customer strategy that defined a mission, strategic objectives, and major projects that linked to technology initiatives and created new initiatives to deepen relationship with customers. Each strategic objective, and related projects, was plotted onto a migration path to give implementation direction to the strategy.



## Financial Institution Innovation to Drive Services

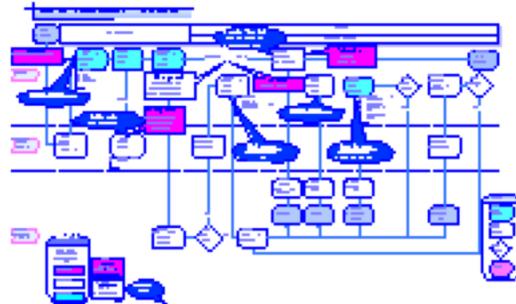
### **Background:**

Our customer had reorganized to offer stronger equity investment services through its website and retail branches. Although equity services are heavily transactional, our client believed it could achieve market differentiation by offering the service as a complete “customer experience.” We won a competitive proposal to help them do this.

### **Approach:**

Our approach was in the following steps:

- Exploratory Consulting: where we interviewed all executives and department heads to understand the bank’s strategy for investment services and its capabilities to deliver the service
- Customer Research: where we developed a questionnaire and did the quantitative research necessary to understand the customer base and its purchasing behaviors
- Experience Mapping: where we mapped the customer experience to identify “pains” in the process as well as opportunities for “gains”
- Reporting: where we integrated learnings from the previous three steps to demonstrate to the client how to improve the customer experience to attract and retain customers with efficient processes and interactions that evoke an emotional response.



### **Output:**

The client established an implementation team to:

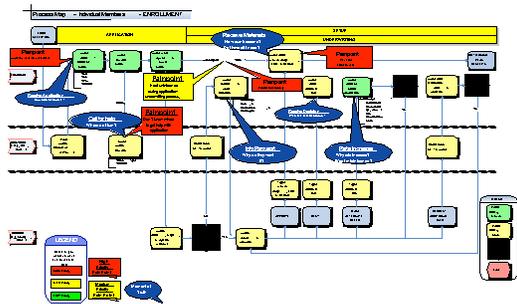
- Remove “pains” that were creating a perception that the bank was “not easy to do business with.” This led to better training and technology in the call center, easier forms for processing, fewer signatures to authorize payment of claims, and better technology
- Acquire “gains” by making emotional connections with customers by softening the appearance of the website and staging the retail experience with proactive information going out to customers, better office lay-out and amenities, and higher quality staff.

# Health Care Mapping the Future

## Background:

Our health insurance client wanted to be the most respected provider in the industry. They asked us to help them achieve this by building a better customer experience.

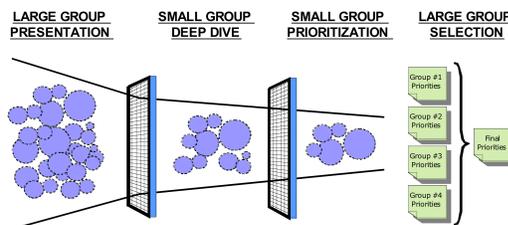
## Approach:



We interviewed managers and operational staff so we could do an end-to-end process map of the customer experience. Next we reviewed over 35 customer research documents so we could plot points of: expectation, pain, and differentiation onto the map.

We used this information to hold several working sessions to generate ideas on how to improve the customer experience. These ideas were evaluated and then the teams built business cases for the best.

We held a full day working session with the executive steering committee. The initiatives were put to the whole group then smaller work groups did detailed analysis and planning on the initiatives. The best of these were selected and submitted to the executive committee for approval.



## Result:

The client made quick changes, “on the ground”. For example, they: made the application process more user friendly; targeted training improvements in the call center; simplified the criteria around the claims process; and did proactive, out bound calling to clients to explain service choices and billing procedures.