

## **CHAPTER 5: MANAGE CUSTOMER EXPERIENCE. /MANAGING CUSTOMER EXPERIENCE**

### **5.1 Introduction of the Unit of Learning / Unit of Competency**

This is a core unit that enables the trainee to manage customer experience. It covers crucial topics in the field of customer experience management which include: identifying the competitive edge of a business, promotion of product/service innovation, developing quality management systems, managing customer outreach initiatives, establishing a Customer Relationship Management (CRM) system, establishing customer virtual platforms and promoting customer feedback, for programs. By the end of this unit, the trainee must be in a position to demonstrate competency in developing customer outreach programs, carrying out customer experience research, formulating and implementing quality management standards, developing and successfully implementing customer relationship management strategies, carrying out assessment on quality assurance systems among other competencies.

This unit is crucial in equipping the trainee with the necessary knowledge and skills to successfully manage customer experience, thereby promoting economic operations in business organizations. In order to successfully complete this unit, the trainee requires basic resources which include writing materials, check sheets, control charts, cameras, tablets, developed questionnaires and access to reliable internet connection. The trainee will be taken through learning activities, take part in self-assessment and will also be assigned further reading activities. The unit introduces the trainee to the main concepts of managing customer experience which is a crucial topic in the field of business management.

### **5.2 Performance Standard**

By the end of the unit the trainee should be able to define strategies for creating a competitive edge, develop product and service delivery innovation, establish and document a quality management system, manage internal and external quality audits, establish mechanisms for customer relationship management, manage customer outreach and virtual platforms, in accordance to marketing procedures, organizational policies, organizational budget, product development guidelines, and ensure that quality standards of the organization are met in accordance with the relevant quality assurance certification bodies.

### **5.3 Learning Outcomes**

#### **5.3.1 List of Learning Outcomes**

- a) Establish business competitive edge
- b) Develop product and service delivery innovation
- c) Establish Quality Assurance System
- d) Establish Customer Relationship Management (CRM) system
- e) Manage Customer Outreach
- f) Plan Outsourcing services
- g) Manage Customer Social Media
- h) Generate Customer Feedback Report

### 5.3.2 Learning Outcome No. 1. Establish Business Competitive Edge

#### 5.3.2.1 Learning Activities

Learning Outcome #No...1... Establish Business Competitive Edge	
Learning Activities	Special Instructions
<ul style="list-style-type: none"><li>Select a hypothetical small or medium enterprise, undertake a market needs assessment, conduct a customer experience survey and recommend opportunities that can be exploited and strengths to maintain.</li></ul>	<ul style="list-style-type: none"><li>Follow <a href="https://blog.smile.io/loyalty-case-study-sephoras-beauty-insider-vib">https://blog.smile.io/loyalty-case-study-sephoras-beauty-insider-vib</a> to check out Sephora's customers' experiences</li></ul>

#### 5.3.2.2 Information Sheet No. 5/LO1

##### Introduction

In this section the trainee will learn how to establish business competitive edge by carrying out assessment of market needs, conduct customer experience survey, analyze and interpret the results, as well as identifying the business strengths and opportunities of a business. The trainee will also learn how to derive practical implications of the results and apply them to real situations in the organization.

##### Definitions of key terms

**Customer experience** is a holistic approach that goes beyond customer service department and is the responsibility of everyone in an organization. Unlike customer service which focuses on single specific interaction at a time, customer experience takes into account the overall customer journey by building long term relationship with customers (Ameyo, 2019).

**Competitive Edge** is the added advantage that an organization has over its current and potential competitors which in the case of managing customer experience means that the organization offers added value to its customers.

##### Guidelines

For effective customer experience mapping, a brand must know how to create a customer journey map that would aid in:

- i. Identifying all touch-points where customers interact with a brand
- ii. Prioritizing the specific customer needs for each phase of the buyer's journey
- iii. Ensuring that the customer journey is aligned in ideal chronological order
- iv. Identifying the gaps between the expected customer experience by the customer and the one actually delivered by the brand
- v. Determining the relevant actions to direct efforts and expenditure on priorities to maximize customer satisfaction and organizational effectiveness content
- vi. Developing an ICT policy for overseeing crucial activities and information sharing with regards to customer experience

## **Customer Experience Strategy**

The real secret to improving customer experience is to take clear action. A customer experience management strategy helps you decide what you have to do in order to deliver a remarkable customer experience across interactions, and measure the results to further improve your customer experience strategy. Right customer experience strategy along with optimal customer experience platform reduces costs, increases brand value, and allows you to gain the much-needed edge to stand out from your competition.

Brands must consider the following key factors while devising a customer experience strategy:

### **i. Reachability and Convenience**

Companies need to identify the channels where their customers are active. Channel accessibility for customers in terms of reach out is a prerequisite for effective customer experience strategy. Also, a well-planned customer experience strategy takes into consideration the purchase and service convenience from the customer's perspective.

### **ii. Channel Flexibility**

Buyer's journey consists of multiple touch-points and a consumer might interact with a brand via different channel at specific touch-points. An ideal customer experience strategy takes this requirement into account and ensures flexibility to switch channels for a customer without losing the context of previous customer interactions or compromising on the seamless experience.

### **iii. Personalization**

A customer experience strategy will only work if it succeeds in delivering personalized experience to individual customers. Brands which cater to each customer's needs in a differentiated manner will stand out among the competitors. A good CX strategy has customer at the center and intelligently applies customer insights gathered at each touch-point for smart interactions.

### **iv. Customer Journey Maps**

Every brand witnesses a unique customer journey, and identifying the various touch points where a customer interacts with a brand is essential for the organization to deliver unified and consistent customer experience. It helps brands to plan and prepare in advance to serve their customers throughout their customer life cycle.

## **Customer Interaction Management Challenges**

Today's digital consumer demands more, and expects a brand to exceed their expectations every time s/he deals with a brand. The customers have a wide array of choices when it comes to choosing the right business to invest in, and would often go with the best the market has to offer that fits their budget.

Delivering an awe-inspiring customer experience remains imperative for a business to survive these times of digital transformation. Intelligent customer interaction management software facilitates in addressing key customer interaction challenges every business face in driving seamless customer interaction management by:

- **Creating Consistent Experiences Across Channels**

Every customer interaction matters for delivering memorable customer experience and consistency across the customer life cycle results in brand loyalty. Giving the customers an option to connect with a brand through multiple channels, is just a halfway measure. What is essential is to deliver the consistent quality customer service and support across channels, whether it is through phone, email, on social media, or via website.

- **Integrating Channels, Systems and Processes**

Working in silos is a major obstacle in delivering seamless customer experience. In addition to the siloes communication channels, disintegration between front-office and back-office systems and processes makes it difficult to provide quick and appropriate customer service. Organizations must identify an appropriate mix of tools to achieve integration of disparate channels, applications across various processes.

- **Consolidating Data into a Single View of Customer**

Single customer view, also known as ‘360 degree’ customer view or ‘unified’ customer view can be defined as a method for gathering and displaying all the customer related data into a single record. Organizations must understand that without a way to maintain a unified customer view, they cannot analyze their customer preferences, or deliver personalized experiences.

## **How to Improve Customer Experience**

Customer experience management (CEM) aims for continuously adding value to customers. With growing digitalization, customers expect brands to facilitate seamless, minimum-effort, and highly engaging cross-channel interactions as the minimum requirement. Organizations need to plan how they can foresee, changing customer expectations and how to improve customer experience in a call center by including customer experience as a part of their business strategy.

- **Place Customer at the Center of Business Strategy**

The customer stands at the center of every business and it is important to understand the customer in depth at each and every touch point. Organizations should plan and implement a customer experience strategy with relevant tools and technology to achieve a 360-degree customer view and analyze customer’s sentiments & social indexes, across customer interaction history to deliver superior customer experience. This will also help the businesses to leverage the customer interaction-history analysis to strategies up-sell and cross-sell opportunities converting customer support departments from cost centers into profit centers.

- **Establish Clear Cross-Functional Accountability**

Exceptional customer experience calls for clear accountability between the front office functions like sales, marketing, and customer service with back-office functions such as business intelligence, reporting, procurement, inventory management, etc. With cross-functional accountability, seamlessness and speed can be maintained across the customer query resolution process by identifying the bottlenecks hampering SLAs. Any changes or updates in the customer query is captured and tracked across the systems on a real-time basis.

- **Empower Employees with Customer Insights and Knowledge**

Customer support agents act as the face of the company when they interact with the customers across the touch points and it is crucial to empower them to deliver great customer experience. When agents can access the single view of customer interaction history across the channels, they are better equipped to understand the customer's perception and expectations from the brand and are better placed to deliver a seamless, personalized and dynamic experience.

## **Market Needs Assessment**

Market assessment is a detailed and objective evaluation of the potential of a new product, new business idea or new investment (Singapore Management University, 2019). It is a comprehensive analysis of environment forces, market trends, entry barriers, competition, risks, opportunities and the company's resources and constraints.

## **Case Study**

### ***Remember New Coke?***

*In 1985, Coca-Cola replaced the original Coke with New Coke. This was done in an attempt to challenge the increasingly popular Pepsi. After just 79 days of public outcry, Coca-Cola had to bring back the original formula and New Coke was eventually phased out.*

*Coca-Cola spent two years and millions of dollars on research before the launch. They focused on the physical aspects of the product, overlooking the strong brand that loyal customers had come to associate and identify with. They failed to ask the right questions during the research and as a result, collected irrelevant information. You need to remember that it is not enough just to conduct market assessment. You need to make sure that you are doing it right.*



### Company Competitive Edge

Competitive advantage is defined as the ability to stay ahead of present or potential competition. This is typically done by evaluating strengths and weaknesses of competitors and seeing where you can fill in the gap or step up and improve (Garfinkle, 2019). Companies develop a competitive edge when they produce attributes that allow them to outperform their competitors.

Here are seven ways companies and individuals can create an edge;

- i. **Cost Leadership Strategy.** Companies may place themselves ahead of the pack by offering attractive pricing. Wal-Mart and Amazon are two companies that have risen to the forefront by this strategy. While this is effective for companies, low pricing is seldom a desirable method for individuals.

- ii. **Differentiation Strategy.** Branding is likely the most widely used method to differentiate one company from another. With this method, a name like Nike or Rolex automatically assumes a status distinct and apart from all other shoes or watches. Individual executives using this method must seek to find a core strength or talent that separates them from the pack. Then they leverage this unique skill or ability through increasing their visibility and the perception of its value to the company.
- iii. **Innovative Strategy.** Companies may move ahead of the competition by doing things in new and different ways. Insight has created a way to eliminate brain tumors and other cancers without cutting into the body. Clearly, they gain a competitive edge over traditional surgeries by reducing pain, risk, and long recovery time. People can gain a competitive edge as they discover and offer innovative ways of doing things for the company. If your ideas consistently result in benefits to the company, you'll have that essential edge.
- iv. **Operational Effectiveness Strategy.** Some companies just do what they do better than anyone else. FedEx started out with an innovative strategy. But it continued its leadership — even after dozens of other companies jumped into the overnight shipping business — by doing it very well. For individuals, this may mean creating systems of operating or new ways to analyze data. When you do what you do very well, you gain a competitive advantage over those doing it the longer and slower way.
- v. **Technology Based Competitive Strategy.** Since the time Henry Ford revolutionized the auto industry with the assembly line, companies have sought for a competitive edge using new technology or technology in a new way. Computers and applications continue to briefly give companies an advantage over the competition. Workers who embrace new technology and learn to master it nearly always redefine or increase their competitive advantage over those who resist new methods.
- vi. **Adaptability Competitive Advantage.** As markets, economies, and other factors change in this increasingly unstable and unpredictable environment, companies that can adapt have a distinct advantage. Typically, this includes smaller or trendy companies. However even Apple has successfully negotiated the waves of change. Executives can bring adaptability to their core strength by being open to change. They can cross train and bring new and more current skills to the table. Perhaps, adaptability is foremost a state of mind.
- vii. **The Information Advantage.** Almost all the other strategies benefit from excellent information. The definition of competitive advantage is the skills needed to outpace your rivals. Most of those come through knowledge and information. Successful companies seek the latest in technology, strategies, and data.

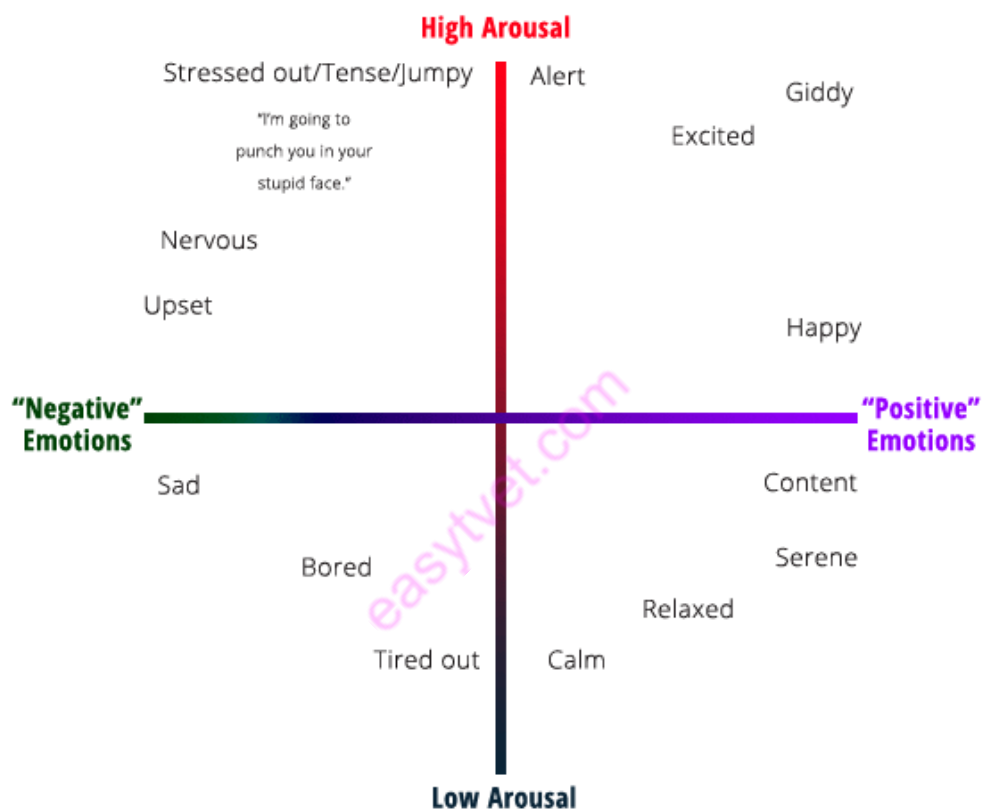
### **Customer experience Survey**

Measuring customer satisfaction allows you to diagnose potential problems, both at the individual and aggregate level. More importantly, it allows you to improve over time (Birkett, 2019). Customers share good experiences with an average of 9 people and poor experiences

with about 16 (nearly two times more) people -- so it's imperative you figure out customer issues and try your best to solve them before they go viral on Yelp or social media.

There are so many benefits of asking for feedback on customer satisfaction:

- i. Customer feedback provides insights to improve the product and overall customer experience.
- ii. Customer feedback can improve customer retention.
- iii. Customer feedback identifies happy customers who can become advocates.
- iv. Customer feedback helps inform decisions.



Source: *The Thinking Zygote*

## Customer Satisfaction Question Types & Survey Design

### 1. Binary Scale Questions

The first type of survey question is a simple binary distinction:

Was your experience satisfying?

Did our product meet expectations?

Did this article provide the answer you were seeking?



Did you find what you were looking for?

## 2. Multiple-Choice Questions

Multiple-choice questions have three or more mutually exclusive options. These tend to be used to collect categorical variables, things like names and labels.

## 3. Scale Questions

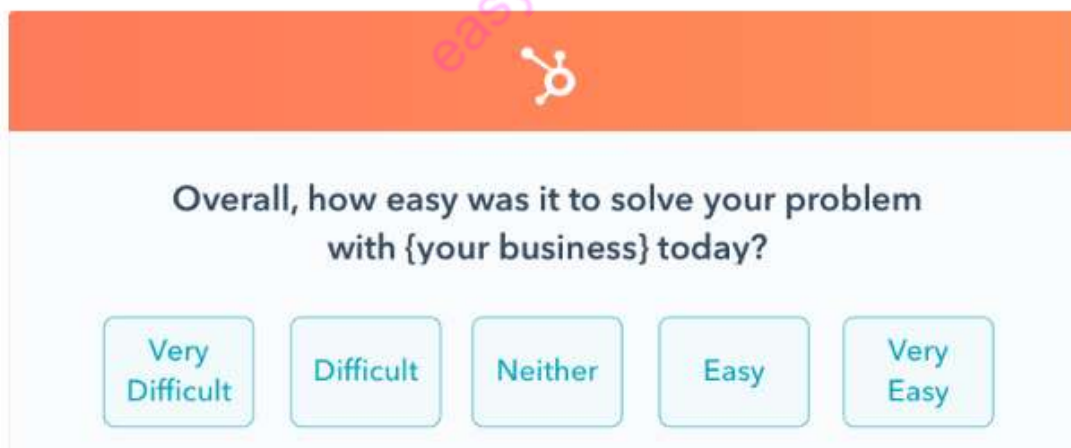
Here's where we get into the meat of customer satisfaction survey design. Almost all popular satisfaction surveys are based on scale questions. For example, the CSAT score asks, "how satisfied with your experience," and you may get to rate the experience on a scale of 1-5 (a Likers scale).



How satisfied were you with your experience today?

Worst (1) (2) (3) (4) (5) (6) (7) Best

The survey scale could be comprised of numbers or you could use labels, such as "strongly disagree, disagree, neutral, agree, and strongly agree."



Overall, how easy was it to solve your problem with {your business} today?

Very Difficult Difficult Neither Easy Very Easy

## 4. Semantic Differential

Semantic differential scales are based on binary statements but you're allowed to choose a gradation of that score.

The central line serves as the neutral point:



Source: *Explorable*

## 5. Open-Ended Questions

As I mentioned, the above survey questions don't allow for qualitative insights. They don't get at the "why" of an experience, only the "what."

Qualitative customer satisfaction feedback is important. It helps identify customers' value propositions, and helps learn about things most important to the customer -- which you won't glean from a numerical or multiple-choice survey.

### Business strengths and opportunities Identification

This is done by conducting a SWOT analysis of the organization. The strengths and weaknesses analysis enables the organization to determine the areas to improve as well as those to capitalize on. On the other hand, the opportunities and threats analysis enables the organization to understand the potential areas of growth as well as the potential threats to its growth thereby developing ways of mitigating these threats in due time.



## Conclusion

Any business requires to be at the top of the game in order to maximize on the profits. Having a niche is what makes a company stand out. Business managers are required to carry out regular market needs assessment, customer experience surveys, identify business strengths and opportunities and act on the recommendations to achieve a competitive edge.

### 5.3.2.3. Self-Assessment

1. Conduct a customer experience survey for the course you are undertaking.
2. Outline the opportunities for improvement from the survey carried out.
3. Define competitive edge
4. What is market needs assessment
5. What are ways of conducting customer experience survey?
6. Describe business strengths and opportunities identification by using SWOT analysis for a business of your choice
7. Innovation is defined as:
  - a) The commercialization of a new product or process.
  - b) The invention of a new product or process.
  - c) A new product or process idea.
  - d) The implementation of a new production method.
8. Process innovation refers to:
  - a) The development of a new service.
  - b) The development of a new product.
  - c) The implementation of a new or improved production method.
  - d) The development of new products or services.
9. Innovation can help to provide a temporary competitive advantage when:
  - a) Barriers to entry are high.
  - b) Barriers to imitation are low and intellectual property rights are difficult to enforce.
  - c) There are few other competitors.
  - d) Barriers to entry are low.
10. Following establishment of a dominant design in the product life cycle, what would you expect to happen?
  - a) Emphasis on product innovation rather than process innovation.
  - b) Emphasis on process innovation rather than product innovation.
  - c) Competition to increase as new firms enter the industry.
  - d) Competition to decrease as more firms exit than enter the industry.

### 5.3.2.4. Tools, Equipment, Supplies and Materials

- Laptops/Computer lab
- Survey templates
- Model Organizational Policies and procedures
- Reliable Internet connection

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### 5.3.3. Learning Outcome No. 2. Develop product and service delivery innovation

#### 5.3.3.1. Learning Activities

<b>Learning Outcome #No. 2. Develop product and service delivery innovation</b>	
<b>Learning Activities</b>	<b>Special Instructions</b>
<p><b>Marshmallow Challenge</b> The basic idea is that a team is given a handful of supplies to work with - spaghetti, tape, and string - and given 18 minutes to build the tallest possible tower that can SUPPORT a marshmallow.</p> <p><b>LEARNING SKILLS</b> Forming Innovation Team Analyzing innovation strategies Training/brainstorming Piloting innovation Registration of innovation</p>	<p>Each team gets the same set of supplies...</p> <ul style="list-style-type: none"> <li>• 20 sticks of dry spaghetti</li> <li>• one yard of string</li> <li>• one yard of tape</li> <li>• one marshmallow</li> </ul> <p>Instructions <i>Challenge: To build the tallest tower possible in 18 minutes that will support the marshmallow.</i></p> <ol style="list-style-type: none"> <li>1. Set up the supplies for each team</li> <li>2. Explain the challenge: <i>Build the tallest tower possible that will support a marshmallow, in 18 minutes.</i></li> <li>3. Set a timer for 18 minutes</li> <li>4. Go!</li> </ol>

### **5.3.3.2. Information Sheet No. Chapter 5/ LO2**

#### **Introduction**

Every business requires continuous innovation to maintain its competitive edge. In this section the trainee will learn how to form product innovation committee, formulate innovation strategies, champion team training, implementation of approved innovation and protecting innovations through patents and registration.

#### **Definitions of key terms**

**Product/service delivery innovation**– The process of translating an idea or invention into a good or service that creates value or for which customers will pay. To be called an innovation, an idea must be replicable at an economical cost and must satisfy a specific need (Business Dictionary, 2019).

#### **Types of Innovation**

Innovation has become such a buzzword it can be hard to remember what it actually means (Baer, 2019). Depending on who you talk to, the bar for “innovation” might seem incredibly high (“Let’s be the next Netflix!”), or far too low (“Let’s hang up some hammocks in our office!”).

#### **Product Innovation**

When people think of innovation, often, they’re thinking of product innovation. Product innovation can come in three different forms. 1) The development of a new product, such as the Fitbit or Amazon’s Kindle. 2) An improvement of the performance of the existing product, such as an increase in the digital camera resolution of the iPhone7. 3) A new feature to an existing product, such as power windows to a car.

Drivers of product innovation might be technological advancements, changes in customer requirements, or outdated product design. Product innovation is generally visible to the customer and should result in a greater demand for a product.

#### **Process Innovation**

Process innovation is probably the least sexy form of innovation. Process is the combination of facilities, skills, and technologies used to produce, deliver, and support a product or provide a service. Within these broad categories, there are countless ways process can improve.

Process innovation can include changes in the equipment and technology used in manufacturing (including the software used in product design and development), improvement in the tools, techniques, and software solutions used to help in supply chain and delivery system, changes in the tools used to sell and maintain your good, as well as methods used for accounting and customer service.

While product innovation is often visible to your customers, a change in process is typically only seen and valued internally. Speaking generally, changes in process reduce costs of production more often than they drive an increase in revenue. Of the three types of innovation, process is typically the lowest-risk.

#### **Examples:**

1. One of the most famous and groundbreaking examples of process innovation is Henry Ford's invention of the world's first moving assembly line. This process change not only simplified vehicle assembly but shortened the time necessary to produce a single vehicle from 12 hours to 90 minutes.
2. Recently, Differential built a mobile sales dashboard for Group Bimbo. The baking company has 65 manufacturing plants and 2.5 million sales centers located in 22 countries, across 3 continents. As a result, the executive team members travel a lot, meeting with their direct reports around the world. Having a mobile sales dashboard gives the team quick access to the sales information and other KPI's for each country, channel, and brand, cutting out guesswork in sales decisions, and reducing meeting time.

### **Business Model Innovation**

Business model innovation does not necessarily imply changes in the product or even in the production process, but in the way as it is brought to the market. Whereas both product and process innovation can be incremental and moderate, business model innovation is almost always radical, risky, and transformative.

#### **Examples:**

1. IBM has managed changes in customer offers from mainframes to personal computers to technology services.
2. Amazon found a new channel to the customer through technology by eliminating the traditional retail distribution channel and developing direct relationships.

### **Traits of Successful Innovation Teams**

It's no secret that innovation is tough to pull off, and even the "most innovative" companies, such as General Electric and Whirlpool and Proctor & Gamble (sinking to No. 47 on BCG's list) can fall fast, despite great effort on the part of their innovation leaders (Tucker, 2018).

The following shared traits stood out:

1. Standout programs spend more time on transformational innovation, less on incremental.
2. They get the right people to the innovation bus.
3. They create effective incentives to support innovation.
4. They put real dollars to work - The more successful innovation company programs are more willing they are to put financial resources behind their innovation ambitions.
5. They make innovation a part of the organizational DNA.
6. They bring investment groups into the mix.
7. They get funded from multiple sources and stay flexible.
8. They avoid politics and turf wars by partnering effectively with the business units.
9. Standout programs are aligned with the overall strategy.

### **Business Innovation Strategies**

Innovation strategies can be classed as proactive, active, reactive and passive (Dodgson, Gann, & Salter, 2008).



## **Proactive**

Companies with proactive innovation strategies tend to have strong research orientation and first-mover advantage, and be a technology market leader. They access knowledge from a broad range of sources and take big bets/high risks. Examples include: Dupont, Apple and Singapore Airlines.

The types of technological innovation used in a proactive innovation strategy are:

- Radical - breakthroughs that change the nature of products and services
- Incremental - the constant technological or process changes that lead to improved performance of products and services.

## **Active**

Active innovation strategies involve defending existing technologies and markets while being prepared to respond quickly once markets and technologies are proven. Companies using this approach also have broad sources of knowledge and medium-to-low risk exposure; they tend to hedge their bets. Examples include Microsoft, Dell and British Airways.

These companies use mainly incremental innovation with in-house applied research and development.

## **Reactive**

The reactive innovation strategy is used by companies:

- which are followers
- have a focus on operations
- take a wait-and-see approach
- Look for low-risk opportunities.

They copy proven innovation and use entirely incremental innovators. An example is Ryanair, a budget airline which has successfully copied the no-frills service model of Southwest Airlines.

## **Passive**

Companies with passive innovation strategies wait until their customers demand a change in their products or services. Examples include automotive supply companies as they wait for their customers to demand changes to specification before implementing these.

## **Successful Innovation Implementation**

Innovation is more than generating the next big idea—it involves how you implement the ideas that make it out of the gate, and how you build the culture to sustain the creation of those ideas (Brands, 2015). Thus, innovation's ability to modify strategy is critical. Implementing innovation has 3 big parts.

**1. "Big" Ideas.** Start by creating your innovation mantra. The best mantras inform a company's everyday decisions and are actionable statements of intent, such as: "Create one new Innovation a year"; "Be relentless"; or "Inspire Innovation".

Build your culture of innovation step-by-step, stone by stone. Build consensus, reinforce ideas, and underscore the need for accountability. Don't rush it, and follow the rules of innovation.

Another barrier to making your innovative culture stick is innovation assassinations. The residual effects of the Great Recession still reverberate down the hallway of today's public and private sector organizations. When your team feels insecure, whether that insecurity is justified or not, they are more prone to innovation assassination. Resistance can take many forms, from open dissent to covert subterfuge; but in any form, it is threat to innovation implementation. The first step to countering innovation assassination is by acknowledging its existence. Second is to understand why. Lastly, it can be hard to mitigate these would-be assassins, but the best approach is by reinforcing a culture that accepts, and even encourages, disruption and risk. One of Pixar's mantras has been to "be wrong as fast as we can". I like to say, "fail fast and fail cheap". Google's phrase is "fail well." Risk often translates into failure, so make sure failure is seen and experienced as a "Learning Experience".

**2. People.** The reason innovation implementation can seem a daunting process is largely due to people-related issues. They require patience (and intestinal fortitude) as well as structure to combat.

A key element to implementing innovation is finding and keeping the right people. In the past, an organization's culture would shape the individual employees. However, today it is the value system of the individuals that, collectively, define the organization's style and mores.

The workplace of today is complex. Generations of workers are not always defined by age. Also, technology is changing the way we do things, and it is changing us. It is changing the very DNA of the work environment we have come to know and understand from years of experience. Organizations will have to be nimble in the treatment and care of workers to create a culture of innovation. Organizational structure should be reviewed and modified as appropriate. Think about co-working spaces, new desk layouts and floor plans. In the end, it is imperative to make sure everybody in the organization is engaged and expected to contribute to innovation.

"Real opportunity exists for organizations to step up and create the conditions and commitment needed to encourage innovation in their work environments. If we get this right, we can better retain talent, remain more competitive into the future, and more positively impact society," Deloitte Global CEO Barry Salzberg said in a company statement.

**3. Process.** Create, align, and repeat. When teams collaborate in developing new innovations, having the right mix of ingredients will ensure that its overall marketability will happen relatively quickly and will enhance productivity across the board. According to Soren Kaplan, author, consultant, and educator at NHTV Breda University of Applied Sciences, "The most innovative companies today realize that competitive differentiation comes as much from how they innovate as it does from what they're innovating."

### **Registration and patenting of innovation**

A patent gives the owner the exclusive rights to prevent others from manufacturing, using or selling the protected invention in a given country. A patent is a legally enforceable right granted by the government in return for disclosure of the invention to the public (ihub, 2019). Patent protection is territorial meaning every country grant patent that are only applicable and enforceable in that country. In other words, patents rights can only be enforced in a country where the patent is granted and in force. Kenya Industrial Property Institute (KIPI) is responsible for examining and granting patents in Kenya. KIPI operates under the Industrial

Property Act 2001. However, it is also possible to obtain a patent through the African regional Intellectual Property Organization (ARIPO), which is a regional intergovernmental organization, based in Harare Zimbabwe and which is mandated to grant patents on behalf of its member states. Currently ARIPO has a membership of 16 countries in Africa.

What can be patented? In general, any device, substance, method or process can be patented. For a patent to be granted, the invention must satisfy three requirements, that is the invention must be new, which means that the invention has not been publicly disclosed anywhere in the world; Involve an inventive step, that is the invention must not be obvious to someone with knowledge and experience in the technological field of the invention; and be industrially applicable, in that the invention must be capable of being used in industry. There are certain things that are excluded from for patent protection. These include methods and schemes of doing business, scientific and mathematical formulas, and method of treatment of animals and humans and artistic creations.

Various fees are charged to register patents.

Read more [at KIPI](#).

### **Conclusion**

Product and service delivery innovation is a crucial part of customer experience management as it enables organizations to enhance customer experiences. This process should be carried out by putting into consideration the feedback obtained from customers to either come up with new products and services, to improve the existing products and services. It is also crucial to carry out pilot tests for new products to determine whether they are in line with customer needs. At the same time, patenting of the new innovations is important to maintain a competitive edge by keeping competitors from copying the innovation and engage in unfair competitive strategies.

#### **5.3.3.3. Learning Activities**

1. Study the business processes at the trainee's center, identify one business and undertake the following:
  - a. Advise on formation of an innovation committee
  - b. Work with the committee and come up with an innovation for the business
  - c. Pilot the innovation
  - d. Help register the innovation
2. Established firms relative to new firms are better at:
  - a. All types of innovation.
  - b. Innovation which is competence-enhancing.
  - c. Innovation which is competence-destroying.
  - d. Innovation which is disruptive.
3. In which markets are network effects likely?
  - a. Markets subject to increasing returns
  - b. 'Tippy' markets
  - c. Hi-tech product markets
  - d. All of the above
4. Which of the following are valuable in a standards war?

- a. Competitive advantage
  - b. Late mover advantage
  - c. Early mover advantage
  - d. Technological advantage
5. The fundamental challenge of knowledge transfer in multinational firms is:
    - a. Transferring explicit knowledge across borders.
    - b. Transferring tacit knowledge across borders.
    - c. Creating tacit knowledge in overseas subsidiaries.
    - d. Transferring tacit and explicit knowledge across borders.
  6. What potential advantages can be gained from involving overseas subsidiaries in R&D activities?
    - a. Local subsidiaries offer financial advantages such as lower land and labour costs.
    - b. Local subsidiaries offer access to local companies
    - c. Local subsidiaries offer access to technical knowledge and skills.
    - d. Local subsidiaries offer financial advantages as well as access to local markets, technical knowledge and skills.
  7. Outsourcing of innovation globally is more likely where:
    - a. Innovations are autonomous
    - b. Innovations are systemic
    - c. Innovations are systemic or autonomous
  8. Innovations are made by service sector firms
    - a. True
    - b. false

#### **5.3.3.4. Tools, Equipment, Supplies and Materials for the specific learning outcome**

- Laptops/Computer lab
- Model strategic plan
- Model Organizational Policies and procedures
- The PPRA Act 2015 and its regulations
- Internet

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### 5.3.4. Learning Outcome No. 3. Establish Quality Assurance System

#### 5.3.4.1. Learning Activities

<b>Learning Outcome #No...3... Establish Quality Assurance System</b>	
<b>Learning Activities</b>	<b>Special Instructions</b>
Train the trainees as ISO 9001:2015 implementers	Invite industry to undertake this training
Train the trainees to prepare documentation and prepare Quality policy, quality objectives, context documents and review SOPs to comply with ISO 9001:2015	
Train the trainees as Auditors and undertake internal audits	
Audit one of the departments based on ISO:9001 and SOPs	
Conduct a management review meeting	
Review the SOPs as per feedback but in compliance with ISO 9001:2015	

#### 5.3.4.2. Information Sheet No. 5/ LO3

##### Introduction

In this section, the trainee will learn different concepts relating to quality assurance systems in customer experience management. The trainee will learn the implementation, monitoring and maintenance of quality management systems in relation to customer experience management. The section also discusses evaluation and improvement of QMS based on internal standard operating procedures as well as ISO standards.

##### Definitions of key terms

##### Quality assurance

Quality assurance can be defined as "part of quality management focused on providing confidence that quality requirements will be fulfilled." The confidence provided by quality assurance is twofold – internally to management and externally to customers, government agencies, regulators, certifiers, and third parties. An alternate definition is "all the planned and systematic activities implemented within the quality system that can be demonstrated to

provide confidence that a product or service will fulfill requirements for quality (American Society for Quality, 2019)."

### **Certifying body**

An accredited registrar, also called an accredited certification body (CB), is an organization accredited by a recognized accrediting body for its competence to audit and issue certification confirming that an organization meets the requirements of a standard (e.g. ISO 9001 or ISO 14001).

### **Quality audit**

Quality audit is the process of systematic examination of a quality system carried out by an internal or external quality auditor or an audit team. It is an important part of an organization's quality management system and is a key element in the ISO quality system standard, ISO 9001.

## **QUALITY MANAGEMENT SYSTEM BASED ON ISO 9001:2015**

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies).

ISO 9001:2015 is an international standard that specifies requirements for a quality management system (QMS). Organizations use the standard to demonstrate the ability to consistently provide products and services that meet customer and regulatory requirements.

It means an organization has;

- 1.1. Met the requirements in ISO 9001.
- 1.2. Passed a physical ISO 9001:2015 certification audit by a registered Certifying Body (CB).

## **BENEFITS OF ISO 9001 CERTIFICATION**

1. Achieve organizational goals
2. Reduce costly errors and wastage
3. Boost customer satisfaction
4. Market your business more effectively
5. Manage growth more effectively
6. Improve documentation availability
7. Correct issues to continually improve products and services
8. Grow market share in new territories and market sectors
9. Create a culture of quality
10. Embed vision into all projects
11. Better internal communications
12. Consistent products
13. Effectively measure performance of individuals and teams
14. Improve compliance

## **ESSENTIALS STEPS TOWARDS ISO CERTIFICATION**

### **1. Develop your management system**

- Identify your core or business processes.



- Document processes with the involvement of employees.
- Review, approve and distribute the documents to those who need access to the information.

## **2. Implement your system**

- Ensure procedures are being performed as they are described in your documentation.
- Ensure employees are trained properly for the tasks they are performing.
- Create effective reporting systems to cover inspection, testing, corrective actions, preventive actions, management review meetings, monitoring of objectives, statistical techniques and so on.
- Monitor the effectiveness of your processes through the use of measurable data, where possible.
- Review and take action to improve in the areas required.

## **3. Verify that your system is effective**

- Conduct the audit and review the processes and system for compliance and effectiveness. Observe, interview people and look at sample records.
- Identify and report strengths and weaknesses of the management system.
- Take corrective or preventive action as required.

## **4. Register your system**

- Select the appropriate auditing body for external registration.
- Submit your management system documentation for review to ensure it complies with the applicable standard.
- Prepare for review by an external auditor to confirm that the system's requirements are being satisfied and that the management system is implemented effectively.

## **STEPS FOR CERTIFICATION AND POST CERTIFICATION**

The Kenya Bureau of Standards is the main certifying body in Kenya. (Kenya Bureau of Standards, 2019).

Step 1: Preliminary Investigation

Step 2: Application

Step 3: Stage One Audit

Step 4: Stage Two Audit

Step 5: Certification Decision

Step 6: Surveillance

Step 7: Recertification

## **QMS requirements**

A quality management system requires a number of essential elements. Here are five of them:

- A quality policy and quality objectives. These statements must be documented.
- A quality manual including scope, justifications for any exclusion, documented procedures and process interaction descriptions. This will specify how a QMS will be observed and emphasize the company's commitments to both continuous improvement and quality.
- Any document procedures required by the compliance standard.

- Any documents needed to ensure the effective operation, planning and control of company processes.
- Records such as evidence of conformity to requirements and of effective QMS operation will be required by the compliance standard.

### **Activities in QMS implementation and monitoring**

1. Train QMS based ISO 9001:2015 implementers – here the organization require to appoint and train the QMS implementation team. The team will be trained on the requirements of ISO 9001:2015.
2. Document the SOPs and align them with the ISO 9001:2015 standard and other ISO standards.
3. Train QMS internal auditors – at this point the institution trains a team of internal auditors.
4. Carry out internal audits to ascertain the level of conformance to the ISO 9001:2015 requirements
5. Apply for certification from an accredited body e.g. KEBS, BSI
6. Undertake continuous improvement i.e. get feedback, undertake management reviews, revise the QMS and recertify the institution.

### **Conclusion**

Following the Industrial Revolution and the rise of mass production, it became important to better define and control the quality of products. Originally, the goal of quality was to ensure that engineering requirements were met in final products. Later, as manufacturing processes became more complex, quality developed into a discipline for controlling process variation as a means of producing quality products. The quality profession expanded to include the quality assurance and quality audit functions. The drivers of independent verification of quality were primarily industries in which public health and safety were paramount.

#### **5.3.4.3. Self-Assessment**

1. The effort required for locating and fixing an error in an operational program
  - A. Testability
  - B. Maintainability
  - C. Usability
  - D. Efficiency
2. The contributors to poor quality in an organization are
  - A. Lack of involvement by management
  - B. Lack of knowledge about quality
  - C. Time constraints
  - D. A and B
3. According to a quality expert, accomplishing quality requires “a thought revolution by management”. Name the quality expert.
  - A. Dr. W.Edwards

- B. Dr. Ishikawa
  - C. Dr. Shewart
  - D. Harold.S.Geneen
4. The effort required for modifying an operational program.
    - A. Flexibility
    - B. Maintainability
    - C. Portability
  5. Definition of Integrity
    - A. Extent to which a program satisfies its specs and fulfils the user’s mission and goals
    - B. Effort required for learning, operating, preparing input, interpreting output of a program
    - C. Effort required to couple one system with another
    - D. Extent to which access to software or data by unauthorized persons can be controlled
    - E. All of the above
  6. Achieving quality is easy. True/False
    - A. True
    - B. False
  7. “Accomplishing quality requires a thought revolution by management” was said by
    - A. Ishikawa
    - B. Deming
    - C. Harold S.Geneen
    - D. Dr. Barry W. Boehm
  8. “Failure to enforce standards” as a contributor to poor quality belongs to which category?
    - A. Lack of involvement by management
    - B. Lack of knowledge
  9. To achieve quality (i.e., defect free products and services), we require
    - A. Close cooperation between management and staff
    - B. Commitment
    - C. An environment in which quality can flourish
    - D. All of the above
  10. Quality is not a long-term strategy.
    - A. True
    - B. False
  11. PDCA cycle is developed by
    - A. Deming
    - B. Dr. Shewhart
    - C. Ishikawa
    - D. Harold S.Geneen
12. Undertake a surveillance audit for your institution and present the audit report.

#### 5.3.4.4. Tools, Equipment, Supplies and Materials for the specific learning outcome

- Laptops/Computer lab
- Model Organizational Policies and procedures

- Reliable Internet connection
- Printers

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### 5.4.5. Learning Outcome No. 4. Incorporate Customer Relationship Management (CRM) System

#### 5.4.5.1. Learning Activities

Learning Outcome #No...4... Incorporate Customer Relationship Management (CRM) System	
Learning Activities	Special Instructions
Open YouTube and search CRM system animation, listen and write down a brief description of what a CRM is.	<a href="https://www.youtube.com/watch?v=7me7mjvTiTI&amp;t=151s">https://www.youtube.com/watch?v=7me7mjvTiTI&amp;t=151s</a>
Analyze the strategies used with your institution in implementation of customer relationship management and give a report	
Conduct a survey on effectiveness of CRM system and give suggestion and recommendations for improvement.	
Analyze various tools used for monitoring customer relation management in your institution.	

#### 5.4.3.2. Information Sheet No. 5/ LO4

##### Introduction

Customer relationship management is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth (Iafrate, 2018). A company that leverages in CRM maintains its clients and keeps its performance high. In this section, the trainee will learn how to develop customer relationship management strategies based on customer expectations and organizational capability.

##### Definitions of key terms

##### Customer Relationship Management

Customer relationship management is an approach to manage a company's interaction with current and potential customers.

##### Customer Relationship Management

Customer relationship management (CRM): principles, strategy, solutions, applications, systems, software, and ideas for effective customer relationship management

Customer Relationship Management, or CRM, is an essential part of modern business management. This CRM article is provided by Ellen Gifford, who specializes in helping organizations develop excellence in CRM, and this contribution is gratefully acknowledged.

What is Customer Relationship Management, or CRM? Customer Relationship Management concerns the relationship between the organization and its customers. Customers are the lifeblood of any organization be it a global corporation with thousands of employees and a multi-billion turnover, or a sole trader with a handful of regular customers. Customer Relationship Management is the same in principle for these two examples - it is the scope of CRM which can vary drastically.

## **Focuses**

Successful organizations use three steps to build customer relationships:

- determine mutually satisfying goals between organization and customers
- establish and maintain customer rapport
- produce positive feelings in the organization and the customers

## **Conditions**

The organization and the customers both have sets of conditions to consider when building the relationship, such as wants and needs of both parties;

- organizations need to make a profit to survive and grow
- customers want good service, a quality product and an acceptable price

Good CRM can influence both sets of conditions.

## **Why CRM?**

CRM is a new concept to many organizations. If it's new to you, here's why most forward-thinking organizations devote lots of energy and resources to set up and management of a CRM capability.

CRM can have a major impact on an organization through:

- shifting the focus from product to customer
- streamlining the offer to what the customer requires, not what the organization can make
- highlighting competencies required for an effective CRM process

The ultimate purpose of CRM, like any organizational initiative, is to increase profit. In the case of CRM this is achieved mainly by providing a better service to your customers than your competitors. CRM not only improves the service to customers though; a good CRM capability will also reduce costs, wastage, and complaints (although you may see some increase initially, simply because you hear about things that without CRM would have stayed hidden). Effective CRM also reduces staff stress, because attrition - a major cause of stress - reduces as services and relationships improve. CRM enables instant market research as well: opening the lines of communications with your customers gives you direct constant market reaction to your products, services and performance, far better than any market survey. Good CRM also helps you grow your business: customers stay with you longer; customer churn rates reduce; referrals to new customers increase from increasing numbers of satisfied customers; demand reduces on fire-fighting and trouble-shooting staff, and overall the organization's service flows and teams work more efficiently and more happily.

## **Features**

The old viewpoint in industry was: 'Here's what we can make - who wants to buy our product?'

The new viewpoint in industry is:

- 'What exactly do our customers want and need?' and
- 'What do we need to do to be able to produce and deliver it to our customers?'



This is a significant change of paradigm and a quantum leap in terms of how we look at our business activity.

### **What do customers want?**

Most obviously, and this is the extent of many suppliers' perceptions, customers want cost-effective products or services that deliver required benefits to them. (Benefits are what the products or services do for the customers.) Note that any single product or service can deliver different benefits to different customers. It's important to look at things from the customer's perspective even at this level.

More significantly however, customers want to have their needs satisfied. Customers' needs are distinctly different to and far broader than a product or service, and the features and benefits encompassed. Customers' needs generally extend to issues far beyond the suppliers' proposition, and will often include **the buying-selling process** (prior to providing anything), **the way that communications are handled**, and **the nature of the customer-supplier relationship**.

Modern CRM theory refers to the idea of 'integrating the customer'. This new way of looking at the business involves integrating the customer (more precisely the customer's relevant people and processes) into all aspects of the supplier's business, and vice versa. This implies a relationship that is deeper and wider than the traditional 'arms-length' supplier-customer relationship.

The traditional approach to customer relationships was based on a simple transaction or trade, and little more. Perhaps there would be only a single point of contact between one person on each side. All communication and dealings would be between these two people, even if the customers' organization contained many staff, departments, and functional requirements (distribution, sales, quality, finance, etc.)

The modern approach to customer relationship management is based on satisfying all of the needs - people, systems, processes, etc. - across the customer's organization, such as might be affected and benefited by the particular supply.

### **Customer-focused solution**

So, what do we need to make this quantum leap of customer integration?

A new way of thinking:

- change in paradigm
- change in the messages sent and received
- change in the overall culture and a new way of doing things:
- processes that are capable and effective
- structures and systems that support a business centered on its customers
- connectivity (end-to-end processes) both internally and externally (e.g., with suppliers)

## **Customers' expectations**

If an organization cannot at least meet its customers' expectations it will struggle. Ideally a business organization should **exceed** its customers' expectations, thereby maximizing the satisfaction of its customers, and also the credibility of its goods and services in the eyes of its customers. Customers normally become delighted when a supplier under-promises and over-delivers. To over-promise and under-deliver is a recipe for customers to become very dissatisfied.

Rule No 1 - You cannot assume that you know what a customer's expectations are ... You must ask.

Rule No 2 - Customer expectations will constantly change so they must be determined on an on-going basis.

The expectations of different customers for the same product or service will vary according to:

- social and demographic factors
- economic situation
- educational standards
- competitor products
- experience

Therefore, given all these variable factors, it is no surprise that one size certainly does not fit all.

Ask your customers what is important to them. Find out why your customers do business with you. There are a wide variety of relationship drivers. For example:

- quality
- price
- product
- location
- customer service

When you ask you might discover some factors that you'd perhaps never even considered, for example:

- health and safety support
- systems compatibility
- contract structure
- distribution flexibility
- technical support
- troubleshooting and problem-solving, to name just a few

What service features will keep your customers loyal to you? Find out.

## **CRM as a Process**

CRM can be regarded as a process, which has:

- identifiable inputs
- identifiable components
- identifiable characteristics, which define CRM for your organization and customer base
- capacity for improvement and evolution over time

## **Managing customers**

Customers are the usual source of income for an organization. (If not then they will certainly leverage your income, as in the case of readers of a free publication which is funded by advertising. As such there are two types of customers: the readers and the advertisers).

Customers are also an exceptional source of information - information which is vital to enable a business to succeed; i.e., giving customers what they want.

Managing customers entails:

- knowing what customers want and need - which enables you to focus your production and service efforts
- knowing which products or customers have most growth potential - which enables you to focus on developing highest potential
- knowing which products or customers are most or least profitable - which enables you to focus on maximizing profit
- knowing which customers will be advocates and supporters - which enables you to provide references, case studies, and to safely test new products and services

## **Achieving good CRM**

Achieving effective Customer Relationship Management requires many organizations to adopt a new perspective. Consider the following:

- Traditional **customer service** is something you '**do to**' the customer
- Modern **Customer Relationship Management** is '**done with**' the customer

The second statement is emphasizing the big differences between conventional traditional customer service, and the modern progressive CRM approach.

Your relationships with customers should be ongoing, cooperative, and built for the long term. Organizations who have many transitory relationships with customers consequently have to spend a lot of money on finding new customers.

The cost of keeping existing customers is a tiny fraction of the cost of acquiring new customers.

## **Pareto's Law ('The Pareto Principle')**

Pareto's Law is commonly known as the 80:20 rule. Typically, in any organization:

- 20% of customers account for 80% of your turnover
- 20% of customers account for 80% of your profits
- 20% of customers account for 80% of your service and supply problems

It is important to know which customers fit into which category and then to manage them accordingly.

Highly satisfied customers who perceive a high value in your products and services commonly make excellent advocates for your organization - nurture these customers and give the special treatment.

Dissatisfied customers who perceive a low value in your products and services are potential saboteurs. These customers could have little or no loyalty and may actively 'engage' against your organization. Therefore, you should seek to rebuild relationships and trust, and a new basis for a future relationship, or manage the separation with dignity, professionalism and integrity.

## **Building relationships**

The essential CRM focus of any organization should be on developing core competencies, and an overall strategy of building customer relationships. In this way, all efforts in the organization can be aligned to:

- customers and the culture of exceeding of customer expectation
- understanding and managing the people impact on the culture of the organization
- customers being recognized and treated as partners
- the value of relationship-building being valued
- service being seen as a value-adding activity
- reward and recognition being based on customer focus ie., 'going the extra mile'
- evidence of corporate support for service activity

## **Characteristics of excellent CRM**

The following characteristics are associated with delivery of excellent CRM:

- reliability
- responsiveness
- accessibility
- safety
- courtesy
- consideration
- communication
- recognizing the customer
- competence

## **'Moments of truth'**

'Moments of truth' are encounters with customers which cause them to form a view of the organization based on how they are engaged, particularly compared to their expectations.

Expectations can be met, exceeded or disappointed. Moments of truth can therefore be positive, in the case of meeting and exceeding expectations, or negative, in the case of disappointment. Monitoring the 'moments of truth' allows the company to focus on improving areas responsible for negative customer experiences.

Remedial action to prevent repetition is crucial. A single mistake is forgivable. A repeat rarely is.

If you handle things right, your customers will see that they are important to you. Handle things right and you will be seen as a supplier who knows how to manage quality.

Organizations that fail to put right things that go wrong, might as well say to the customer, "You are not important to us". Failing to put things right and to prevent reoccurrence says of the organization "We are not capable of managing quality service."

Bear in mind also that research has proven time and again that when an issue of poor service to a customer is satisfactorily resolved by a supplier, the customer increases their loyalty to the supplier to a higher level than existed prior to the problem.

An approach to managing 'moments of truth' involves 'continuous improvement'. This entails processes that continually monitor, check and resolve negative moments of truth by ensuring alterations happen to the customer process, and integrating these changes into 'business as usual'. Here are the elements of such an approach:

- define the cycle of service
- identify negative moments of truth
- define the reasons (i.e., root causes - not symptoms)
- develop solution/s
- test solution(s)/review/amend
- implement
- monitor impact on the cycle of service

This is similar to the EPACA model - the helix of continuous improvement.

Negative moments of truth carry a lot of weight with the customer and will adversely affect the relationship.

To maximize positive moments of truth - **set standards** in your processes.

Standards using SMART criteria Standards (which may also be objectives) can be established using the SMART framework.

- Specific
- Measurable
- Agreed
- Realistic
- Time-bound

### **CRM and communications**

Communication is central to any successful relationship. In terms of Customer Relationship Management, communication needs to be consistent and high quality; as determined by:

- on time
- focused
- relevant
- reliable
- coherent

Importantly also, **for effective communications it's the message and meaning that is received that counts**, irrespective of what the communicator thinks they've said, or written. Communications must be judged most vitally by the reaction of the receiver. If the reaction is not good then the communication is poor.

The information contained in a CRM system allows communication to be directed at the correct audience, in the correct way. The communication system must also encourage and facilitate honest and actionable feedback.

Feedback from customers - especially complaints - are essential for good organizational performance and ongoing development. Most organizations avoid, discourage and hide from

complaints. Don't. Complaints are free guidance for improving your quality, and free opportunities to increase customer loyalty (Business Balls, 2019).

### **People and CRM**

As with any other business process your people have a huge impact on the success of the CRM process.

Successful and effective Customer Relationship Management people tend to display the following key characteristics:

- positive attitude
- people orientation
- organizational skills
- analytical skills
- customer focus (natural empathy)
- understanding of the link between CRM and profitability

On the subject of empathy: Empathy is about **understanding**, not necessarily **agreeing**. Effective customer focus enables the organization and its staff to see both sides, and to work with the customer to arrive at a mutually satisfactory and sustainable solution. Agreement alone amounts to capitulation, which is neither practicable nor sustainable.

### **Benefits of effective CRM**

There are significant business benefits which accrue from an effective, integrated Customer Relationship Management approach. These include:

- Reduced costs, because the right things are being done (i.e. effective and efficient operation)
- Increased customer satisfaction, because they are getting exactly what they want (i.e. exceeding expectations)
- Ensuring that the focus of the organization is external
- Growth in numbers of customers
- Maximization of opportunities (e.g. increased services, referrals, etc.)
- Increased access to a source of market and competitor information
- Highlighting poor operational processes
- Long term profitability and sustainability

Forward thinking organizations understand the vital need to maintain a strategic focus on CRM and to resource and manage it appropriately.

This guide to CRM methodology and application is provided by Ellen Gifford, which is gratefully acknowledged. Aside from being a UK-based specialist in CRM with many years' experience large and small organizations, Ellen is also a trainer in Neuro Linguistic Programming (NLP); management development, and personal coaching. As an advocate of all aspects of interpersonal skills and their importance in modern organizations, Ellen started her own business, The Learning Path, in 1998, to concentrate on providing training in these areas, in which the complementary disciplines of NLP and CRM provide an innovative and effective approach to Customer Relationship Management and to achieving sustainable organizational performance improvement.

## **CRM software solutions and ICT (information and communications technology)**

Software and ICT play a significant part in enabling an effective CRM capability, especially in large organizations.

There are many and various systems available, and it is important to have a clear idea of your requirements during the software solution selection process, which for most organizations will also involve the selection of ICT service provider too, since any software solution, for all but very small companies, generally requires support for specifying, implementation, training and maintenance.

Siebel, Sage (who now provide the well-known Accpac and ACT! CRM solutions), and Front Range (whose product is Goldmine) are all significant and proven CRM software products companies. There are many others, and very many more ICT service providers through whom distribution and support is normally arranged.

As with any ICT project, ensure you work with reliable and knowledgeable advisors, with access to cost-effective proven solutions, who can help you to build and implement an effective CRM software and ICT capability.

## **Assessment of Customer Relationship Management System**

### **Case Study**

Preliminary informal yet thorough discussions were held with key users in Sales, Customer Service and Marketing in order to acquire a good grounding in the usage of and requirements for the CRM.

In order to not lose any opportunity for idea generation, all employees were interviewed. Employees were able to arrange the most convenient time to them for their interview in order to gain maximum production.

The interview time was suggested as up to an hour, or 2 hours for managers.

Days prior to the interviews, questions were given to the interviewees to think about.

In order to provoke maximum thought and ideas on each aspect of CRM, the question, “What would you like to use the CRM for?” included the following subset of questions:

- What don't you like about the CRM?
- What will enable you to focus your attention on the most important business and/or tasks?
- What will enable you to work more efficiently?
- What will enable you to provide a better service to the customer?
- How could the CRM be more informative for you? What reports could it provide?
- How could it integrate even more with your work?
- If you have used any other CRM databases in the past, did they have any functionality you liked that the current one doesn't have?

To gauge impact for future analysis interviewees were asked to rate the amount of impact each requested feature would have on their work, irrespective of the importance they feel it will have at a high level. This is illustrated by a figure (1-5) in brackets, (5) being highest.

Process management and long-term CRM strategy were not discussed in order to avoid confusion and/or antagonism.

Finally, interviewees were asked if there is anything on the CRM database that they do not understand, in order to highlight any training opportunities.

## **Conclusion**

The business manager must remain cognizant of the customer relationship management system. There exists several free and paid up systems that can help propel the company to better customer relations. Being able to introduce CRM will cost less by avoiding the involvement of consultants.

### **5.3.5.3. Self-Assessment**

1. Building and sustaining long term business with customers is the aim of :
  - a. Electronic customer relationship management
  - b. Customer management
  - c. Customer acquisition
  - d. Customer relationship management
2. There are four classic marketing activities involving customer selection, acquisition, retention, and one other:
  - a. Customer differentiation
  - b. Customer extension
  - c. Customer demographics
  - d. None of the answers apply
3. By integrating customer databases with websites, marketing can be improved and the benefits of electronic customer relationship management (e-CRM) then include:
  - a. Increased depth, breadth, and nature of the relationship
  - b. Lower costs
  - c. Targeting more cost-effectively
  - d. Achieve mass customisation
  - e. All the above are correct
  - f. Only the first three answers are correct
4. Permission marketing is an established approach and the concept of opt-in typically involves:
  - a. The customer proactively selecting opt-in
  - b. Profiling a customer's interests and value to an organization
  - c. Using an incentive
  - d. The customer agreeing to receive marketing communications
  - e. All of the above
5. An example of the concept of opt-out is:
  - a. A customer unsubscribing to an e-mail newsletter
  - b. A customer choosing an e-mail newsletter
  - c. A customer agreeing to receive an e-mail newsletter
  - d. None of the above
6. To engage a customer in an online relationship, the minimum information that needs to be collected in an online form is:



- a. Post code
  - b. E-mail address
  - c. Customer profile
  - d. Credit rating
7. A key CRM technique is to encourage existing customers to recommend friends or colleagues to purchase. This is:
- a. Referral
  - b. Cross-sell
  - c. Reactivation
  - d. Up-sell
8. A key CRM technique is a sub-set of cross-selling, but in this case selling more expensive products. This is:
- a. Cross-sell
  - b. Referral
  - c. Reactivation
  - d. Up-sell
9. Using the RACE (Reach, Act, Convert, Engage) marketing value framework, what does Reach aim to do?
- a. Engage audience with brand on its website or other online presence
  - b. Build awareness on other sites and in offline media and drive to web presences
  - c. Build customer relationships over time to achieve retention rates
  - d. Achieve conversions to marketing goals such as fans, leads, or sales on web presences and offline
10. What would be a key performance indicator for the Reach step?
- a. Revenue or goal value per visit
  - b. Conversion rates
  - c. Repeat conversion
  - d. Bounce rate
11. Which of the following refers to the propensity of customers to select products online, but buy offline?
- a. Mixed-mode buying
  - b. Online purchase, online informed
  - c. Online purchase, offline informed
  - d. Offline purchase, offline informed
  - e. None of the above
12. Customers who are signed up for an online service but who have never used it are described as:
- a. Active
  - b. Inactive
  - c. Dormant
  - d. None of the above
13. E-commerce managers aim to integrate an effective mix of electronic communications to drive traffic to their e-commerce sites. Which answer best represents an offline marketing strategy to generate website traffic?

- a. E-mail marketing
  - b. Digital media channels
  - c. Social media marketing
  - d. TV advertising
14. When assessing marketing communications effectiveness, the cost of getting the visitor to the website plus the cost of achieving the outcomes during their visit is known as:
- a. Bounce rate
  - b. Allowable cost per acquisition
  - c. Cost per acquisition
  - d. Referral costs
15. The online communications technique of search engine optimisation involves:
- a. Gaining a good ranking in sponsored listings of the search engines
  - b. Gaining representation on third party sites
  - c. Gaining a good ranking in the organic or natural listings of search engines
  - d. Gaining a position in web directories like Yahoo!
16. The online communications technique of link building involves:
- a. Gaining a good ranking in sponsored listings of the search engines
  - b. Gaining representation on third party sites
  - c. Gaining a position in web directories like Yahoo!
  - d. Gaining a good ranking in the organic or natural listings of search engines
17. A factor which will improve results from search engine optimization is:
- a. Partnering with popular sites with pages relevant to your offering
  - b. Developing effective ad copy which encourages click through
  - c. Including the copy of a search term within a site's web page
  - d. Ensuring that partners can gain good earnings per click
18. Implement the Sugar or Zoho CRM, analyze its components with peers and assess its effectiveness.

#### **5.3.5.4. Tools, Equipment, Supplies and Materials for the specific learning outcome**

- Laptops/Computer lab
- CRM systems
- Model Organizational Policies and procedures
- Reliable Internet connection

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### 5.3.6. Learning Outcome No. 5. Manage Customer Outreach

#### 5.3.6.1. Learning Activities

Learning Outcome #No. 5. Manage Customer Outreach	
Learning Activities	Special Instructions
Analyze the customer of the local dairy/farmers processing plant and map them down.	Trainer may look for an appropriate case study
Request for permission to undertake outreach programs and execute one.	
Analyze the outreach program and propose corrective measures.	

#### 5.3.6.2. Information Sheet No. 5/ LO5

##### Introduction

##### Customer outreach

Customer outreach is the process of connecting and communicating with customers and enhancing relationships. When you interact with customers through social media, review sites, email, or mail, you are doing customer outreach (SMB CEO, 2019). The business manager must be able to utilize various technologies to interact with customers. Customer outreach is a great communication strategy for your business. With outreach marketing, you can tell consumers about your products, promotions, and news.

When it comes to customer outreach, your business reputation is on the line. How you conduct yourself when you communicate with customers directly ties into how customers view your business.

On social media, you can post updates about your business and join the online conversation with customers or leads. With review sites, you should respond to customer complaints and praise. Send emails and mail containing business promotions or company news. In some cases,

you will reach out to people who are unfamiliar with you or your business. In these situations, their first impression of your business is from your outreach.

Customer satisfaction could hinge on your outreach plan. If customers think you are slow to respond on review sites, send too many emails, or post too frequently on social media, their interest in your business might decrease.

### **Ways of conducting customer outreach**

Today, there are more ways than ever to connect with customers. There's email, social media, mobile, meetings, focus groups, trade shows. The list goes on. But which ways are the most effective? The success of a method depends largely, if not entirely, on the business you are in and who or where your customers are. While social media sites--e.g., Facebook, Twitter, YouTube --may work great for some organizations, they may not be the best option for others. Similarly, while some customers may prefer to be contacted via email, others may want or appreciate a phone call or a face-to-face meeting.

Before you invest too much money or time in one particular method of customer outreach, ask your customers how they prefer to be contacted or engaged. As for prospective customers, all the experts we queried suggested organizations try multiple forms of outreach and track which one(s) worked best (Schiff, 2019).

**1. Survey your customers.** "Surveys allow businesses to identify user needs directly," says Reuben Yonatan, CEO, analyst and editor-in-chief of Get, VoIP, which provides guidance and assistance to voice over IP consumers.

"Once customers' needs are known, companies can steer their offerings towards filling these needs," he says. "Surveys are also a good tool to bring in prospective customers who are on the fence about a product/service--i.e. surveys can be used as a platform for prospective customers to voice their wants/needs," Yonatan says

**2. Use newsletters.** "Send out a newsletter about 10 times per year," says Stan C. Kimer, president, Total Engagement Consulting by Kimer. "It should have a table of contents up front so people will at least take three seconds to scan it, and the five to six articles should be short (two to three sentences) and include links to useful resources."

"We segment our [newsletters] according to business verticals and construct targeted content to those verticals," says Maciej Fita, SEO director, Brandignity, an Internet marketing services company. "Our newsletters are filled with free information," not lots of advertising, he adds. "It is a good way to stay on people's radar screens."

"And don't forget to integrate social media functionality!" adds Keith Trivitt, director of Marketing and Communications, MediaWhiz, a performance marketing agency. Include "share" buttons for Facebook, Twitter, Google+ and Pinterest, whichever are relevant. "Not only will you increase the social shares of your content but you'll give your customers and prospects an easy way to spread your company's expertise," he says.

**3. Blog.** "One of the best ways to connect with customers is by blogging," says Deborah Sweeney, CEO, MyCorporation.com, an incorporation and trademarking service. "If you actively keep up a quality blog, not only will your customers read your blog, but they will

respond to your blog," she notes. "This creates a positive flow of communication"--and helps build customer loyalty.

**4. Pick up the phone.** "There's nothing more direct than picking up the phone to call a customer or client," states Gil Efron, cofounder, The Growth Team, a coaching and consulting firm. "Whether following up on a delivery, apologizing for something that went amiss, or wondering why you haven't received an order in a while, there's no better way to build or strengthen a relationship," he says. Moreover, "in a world saturated with one-way communication, the phone provides instant feedback."

**5. Go visit.** "In a recent study SAS sponsored we asked marketers 'What are your company's most effective channels for customer engagement both now and in three years?'" says Jonathan Moran, product marketing manager at SAS, which provides business analytics and business intelligence software. "The top response: 'face to face,' from 59 percent of respondents." That said, when visiting customers, it is critical to listen--and not walk in the door trying to sell them something.

**6. Respond to email.** "At our company, we make it our goal to respond to customer emails within five minutes, and the response we receive from our customers is usually something like 'Wow that was fast!' or 'Fastest response I've ever received. Thanks so much,'" says Giancarlo Massaro, the cofounder of ViralSweep, which provides businesses tools to create giveaways on their website. "How has this helped us? People love amazing customer service and in turn have been referring people to our service, all because of our customer service."

**7. Send a personalized note or a postcard.** "I love sending personalized cards by snail mail to let customers know I'm thinking of them," says Kathy DalPra, the owner of Bride Appeal Web Design & SEO.

"Physical mail is so uncommon these days, it's remembered," DalPra says. "When customers receive a card from me, they know I've put thought and time into it, which translates into feeling valued. And when customers feel valued, they buy and refer their friends."

**8. Be active on Twitter and Facebook.** "One of the best ways to connect with customers is through social media, such as Facebook and Twitter," says Ian Aronovich, cofounder and president, GovernmentAuctions.org, a site that compiles and provides information about government auctions of seized and surplus merchandise from all over the country.

"With social media, you can reach out to your customers at any moment rather than wait for customers to send you emails or phone calls with feedback," Aronovich says. Use your company's Facebook fan page or Twitter account to "engage your followers and keep conversations going. Social media can also be used as a form of customer service, where company representatives can directly answer customer questions and concerns," he says.

"It's critical to have a social media listening post to quickly respond to each issue that arises," notes Chuck Wall, founder and CEO, Customer CEO Consulting. "You may not be able to solve their specific problem, but don't ignore them. They will give you credit for listening and acknowledging their situation."

Similarly, a great way to connect with customers at trade shows and events is to "participate in any 'Twitter parties' using the event hashtag," says Niquenya Fulbright, the president and CEO of Building Bridges Chicago LLC, a small business consulting and executive coaching firm. "Tweet quotes from the speakers as well as your own tips and advice and respond to and engage others who are also tweeting," Fulbright says. Why is this important and how can it help you connect with prospective customers? "One, it establishes you as an expert on the subject, and two, it connects you to potential customers who you can follow-up on later."

**9. Use Instagram.** "Instagram helps us stay connected and engaged with our customers and fans," says Julie Pocino, co-owner and director of Communications & Development at Barnabas Clothing Co.

"We can post pictures and information regularly, and post contests and giveaways," she says. "For our contests and giveaways, we ask our followers to repost and hashtag to enter," Pocino says. "When our followers tag us, we can then go and comment on their posts too. It has been a great way to interact with our fans, and it allows us to post new pictures and content about our brand frequently."

**10. Offer webinars.** "Webinars--seminars delivered over the Internet--are a great way to keep the spice in your customer relationship," says Marc Gutman, chief meeting officer, Lighthouse Conferencing, the provider of audio, video and Web-based conferencing services. To get customers interested, "invite a well-known speaker in your industry to present on a topic your customers want to hear."

**11. Empower salespeople.** "Salespeople can make or break the retail experience," says Joseph Cecere, president and chief creative officer, Little & Company, a provider of design services. "Empowering them with access to real-time answers and information beyond what the consumer can find online provides value that brings shoppers back to the store again and again," he says. "Concierge-like services and expert advice create truly personalized experiences, which are the hallmark of the brick-and-mortar experience. In truth, sales associates are underleveraged store assets."

**12. Provide exceptional customer service.** "One of the most powerful tools an organization has to connect with its customers is its employee base," says Rick DeMarco, managing director, West Coast Operations, Inward Strategic Consulting, a marketing, branding and positioning firm.

"Every interaction between a customer and employee, whether that is pre-sale, the actual sales process, after sales support or billing, provides an opportunity to either add or detract from the equity of your brand and company," DeMarco says. "Significant empirical evidence exists that makes a direct connection between employee engagement and satisfaction and customer satisfaction and loyalty." So one of the best ways to connect and engage with customers, he says, is to "turn your employees into company ambassadors and brand advocates who deliver on your brand promise and business strategy at every single customer touch point."



**13. Go mobile.** "Almost everyone is carrying some kind of mobile device today--92 percent of Americans have a mobile phone," says Nur Sharina Shariff, cofounder, Mobile Sales Systems. And "the use of SMS/text messages is instant, cost effective and a tried and tested communication medium that every mobile phone user knows about and knows how to use," she adds.

"In our modern mobile society one can reach with SMS almost anyone at anytime and anywhere in the world within seconds, making text messaging an easy way for a local business to connect with their customers," she says.

"What better way to connect with loyal customers than with a branded app that integrates location technology, allowing automatic, personalized delivery of messages to consumers near stores?" asks Eric Newman, vice president of products and marketing at Digby, a mobile commerce and marketing technology solutions provider? "Location-aware apps open an entirely new channel for customers and brands to personally connect before, during and after a shopping experience."

**14. Monitor review sites.** "Whether it's Yelp, TripAdvisor or Angie's List, find out what customers are saying about your business [on review sites]," says Lisa Parkin, president of Social Climber, LLC, a social media consultancy.

"Responding to customer reviews on these popular sites shows that your company is aware of any problems and is willing to fix them," Parkin says. However, she urges caution when replying to negative comments. Instead of being defensive or picking a fight, try to understand and offer to fix the problem or provide an inducement for the customer to try your product, service or establishment again.

### **Manage customers' responses**

You can work on becoming a more productive customer support team and take steps to reduce the number of request coming in. By all means, this is worth doing, but the main goal is not only to reduce the number of requests. The key is to provide excellent customer service.

If you put too much focus on just removing customer requests from the queue as quickly as possible, the quality of your response may drop and then you run the risk that your customers will feel they are being treated rudely and/ or being rushed out.

You can create outstanding customer support with the help of the customer service software. While the software takes away the strain of an overloaded queue, you can concentrate on optimizing your customer support processes, reducing your customer service queues and providing a positive experience.

Here's how to manage customer service queues:

1. Acknowledge emails and respond quickly
2. Have all customer information ready
3. Prioritize important customer emails
4. Forward emails to the correct department
5. Offer a self-service option on your website

### Analysis of Outreach program outcomes

Once customer outreach programs are implemented, it is important to evaluate them to determine their success or failure. This enables organizations to formulate and implement corrective measures aimed at ensuring that these programs achieve the set goals and objectives. The cycle below demonstrates how organizations can achieve this process of customer outreach.



Figure 22: Achieving Customer Outreach

### Conclusion

Outreach services certainly seem to have a role in customer engagement, in the ‘local areas’ agenda, and in promoting greater partnership working within local communities. Outreach services may be negatively affected or constrained if: they lack clear goals; lack support from mainstream organizations; lack capacity and/or funds to deliver; face (overly burdensome) outcome-related funding pressures which encourage ‘creaming’; and experience difficulties working in partnership with other (local) agencies.

#### 5.3.6.3. Self-Assessment

1. Building long-term relationships with customers is essential for any business. The application of technology to achieve CRM is a key element of e-business but what does CRM stand for?
  - a. Customer resource management

- b. Consumer relationship management
  - c. Customer relationship management
  - d. Customer retailing management
2. There are different techniques to both initiate and build relationships with customers by using a combination of online and offline techniques. What is the 'customer life cycle' though?
    - a. An approach to building and sustaining long-term business with a customer
    - b. Techniques to encourage customers to increase their involvement with an organisation
    - c. The stages each customer will go through in a long-term relationship with a supplier
    - d. The answers above are all correct
  3. The four marketing activities within the customer relationship management include customer selection, customer acquisition, customer retention, plus:
    - a. Customer Up-sell
    - b. Customer referrals
    - c. Customer extension
    - d. Customer re-sell
    - e. Customer cross-sell
  4. Using digital communications technologies to maximize sales to existing customers and encourage continued usage on online services is known as:
    - a. Sense and respond communications
    - b. Mass customization
    - c. Electronic customer relationship management
    - d. Customer-centric marketing
    - e. Personalization
  5. Using the Internet for relationship marketing involves integrating the customer database with websites to make the relationship targeted and personalized. Through doing this there are many benefits to be gained but which of the below is not an advantage?
    - a. Minimizes breadth, depth and nature of relationship
    - b. Lower costs
    - c. Targeting more effectively
    - d. Achieve mass customization of the marketing messages
  6. Accepting that a customer has agreed to opt-in to receive further information, with customer profiling the minimum amount of online information that needs to be collected is an e-mail address. What is really required though to decide if the customer is a good potential target for further communications?
    - a. Permission marketing
    - b. Opt-out facilities to be removed
    - c. A qualified lead
    - d. Interruption marketing

7. RACE is a practical framework to help marketers manage and improve the commercial value gained from digital marketing. The term stands for Reach, Act, C, and Engage. What does 'C' refer to?
- None of the below
  - Collaborate
  - Convert
  - Consolidate
  - Collect
8. Companies that understand how customers use digital media in their purchase decision buying can develop integrated communications strategies to support their customers at each stage in the buying process. Customers have individual preferences in the ways they use the web depending upon why they need to use it and this web use is known as
- Directed-information seekers
  - Undirected information-seekers
  - Searching behaviors
  - Directed buyers
9. E-commerce managers aim to deliver the most effective mix of communications to drive traffic to their e-commerce sites. The different techniques can be characterized as:
- Offline marketing communications
  - Digital media channels
  - Online marketing communications
  - All of the above
10. A marketing campaign will not be successful if the costs of acquiring site visitors and customers are too high. The term used to describe the cost of acquiring a new customer is known as:
- Referrer cost
  - Bounce rate
  - Cost per acquisition
  - Allowable cost per acquisition
11. The use of online and offline promotion techniques to increase the audience of a site is known as a:
- Quality score
  - Search engine marketing
  - Search engine optimization
  - Traffic building campaign
12. Online public relations (or e-PR) should aim to maximize favorable mentions of companies, products, brands, etc which are likely to be visited by target audiences. Which of the following activities fall within the remit of e-PR?
- Social networks and online communities
  - Link building including reciprocal links

- c. Communicating with media (journalists) online
  - d. Blogs and podcasts
  - e. All of the above
13. Social media (e.g. Facebook, Twitter) usage has become so widespread that to discount a social media strategy would be a mistake best avoided. Social customer relationship management (Social CRM) is a relatively new term which helps to define the broad scope of social media across the customer life cycle and value chain. The Altimeter report (2010) provides a framework for reviewing strategy implementation and is known as:
- a. Social CRM modelling
  - b. The 5Ms
  - c. Social media CRM framework
  - d. None of the above
14. Online marketing communications include the development on online partnerships and are regarded as an important part of a marketing mix. There are three key types of online partnerships; link building, affiliate marketing, and one other:
- a. Online sponsorship
  - b. Media multiplier
  - c. Interactive advertising
  - d. Ad serving
15. E-mail marketing has to make strategic plans regarding outbound and inbound e-mails. E-mail is most widely used as a prospect conversion and customer retention tool. A database of customer names, email addresses and profile information used for e-mail marketing is usually known as:
- a. Viral marketing email directory
  - b. Customer profiles
  - c. Customer and prospect database
  - d. House list
16. A strength of social media and viral marketing is:
- a. Highly targeted with controlled costs
  - b. Considered credible
  - c. Cannot be ignored in user's inbox
  - d. It is possible to reach a large number at relatively low cost
17. Take a field trip to a government office that provides goods and services. Undertake a customer outreach exercise and present a report.

#### **5.3.6.4. Tools, Equipment, Supplies and Materials for the specific learning outcome**

- Laptops/Computer lab
- Smartphones
- Digital Cameras
- Model Organizational Policies and procedures
- Reliable Internet connection

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### 5.3.7. Learning Outcome No. 6. Plan outsourcing services

#### 5.3.7.1. Learning Activities

Learning Outcome #No. 6. Plan outsourcing services	
Learning Activities	Special Instructions
Carry out an audit of the business management department and produce a report of all services required.	
Undertake a cost benefit analysis and give a report of services that can be outsourced	
Identify potential service providers and generate a long list	
Visit the procurement department and investigate on how to come up with a short list	
Prepare a budget for the services to be outsourced	
In groups role play as company, service provider and outsource the services	

#### 5.3.7.2. Information Sheet No 5/ LO6

##### Introduction

Outsourcing is a business practice in which a company hires another company or an individual to perform tasks, handle operations or provide services that are either usually executed or had previously been done by the company's own employees. The outside company, which is known as the service provider or a third-party provider, arranges for its own workers or computer systems to perform the tasks or services either on site at the hiring company's own facilities or at external locations (Rouse, 2019). The business manager must determine, plan and budget for the outsourced budget.

##### Definitions of key terms

##### Outsourcing

Outsourcing is a business practice in which a company hires another company or an individual to perform tasks, handle operations or provide services that are either usually executed or had previously been done by the company's own employees.

##### Determining Outsourced Services

Both big and small companies resort to outsourcing their business functions. Either they choose to outsource most of their functions or just a handful of them so that they can focus on core business aspects. Let's take a look at some of the factors to consider for taking outsourcing decisions for your business.

##### 1) Cost Savings

When you talk in pure business terms, outsourcing needs to improve your business bottom lines through reduced operational costs. If you don't see this happening anywhere in the near future, chances are that you'll end up spending more than you end up saving.

You don't need to be an expert analyst to figure out where you're heading. All you've to see is whether outsourcing will help you reduce a significant amount of your capital in hiring employee and equipment. At the same time, you will also need to maintain a balance between the quality and quantity of the services provided by the outsourced employees/firm.

For instance, if you outsource accounting, you need to see if carrying out this function is taking up more resources and costs as compared to outsourcing it.

## **2) Pricing**

We already discussed how cost-cuttings by hiring talent in a low-price tag is one of the most common factors why companies outsource. You'll get several vendors offering their resources at a competitive price.

However, instead of going for the cheapest vendor, compare and find out what are you going to get from other vendors as well.

For instance, some vendors will also offer customer support at no extra charge, which is a great deal in itself. Just remember that although price is an important factor, it should not be the ONLY factor that helps you zero-in on a vendor.

## **3) The Resources and Technology**

Technology and resources are two considerations that are essential when you choose to outsource.

Ask the vendor about the tools and technologies they are going to use for your project and how capable are they of handling all your outsourcing needs? What about the resources? Are they well trained for the assignments?

Does the vendor have an office with up-to-date systems and can handle the most rigorous of the outsourcing functions? Answers to questions like these will lead the way to select the apt vendor who has the best resources and updated technology for seamless handling of your business functions.

## **4) The Ability to Meet Deadlines**

Timeliness in outsourcing is as important as the costs. For instance, if a vendor fails to toe the deadlines, it can lead to major bottlenecks. That alone will nullify any cost-saving benefits that you had anticipated while hiring them.

You need to ensure that the vendor adheres to the promised quality and timeliness. One of the ways to do this is by making all your queries beforehand.

If you find that the vendor has little quality control measures or does not have any backup plan should they miss a deadline, it is better not to hire them in the first place.

## **5) Minimal Supervision**

When you hire an outsourcing vendor to work on your business requirements, it's a given that they are going to take care of everything from the scratch.

There should be no room for sloppy or shoddy work and they should be able to produce the results.

Choosing a responsible vendor who will be in charge of the projects is a must-have so that you only need to supervise them minimally and let them take it from there.

This will give you more time to focus on your core business functionalities.

## **6) Limit the Liabilities**

More often than not, there are certain functional areas that can build up liabilities for a business. This eats up time and money, which can be spent elsewhere.

You can cleverly outsource certain functions to reduce the liabilities an extent.

### **7) Trustworthiness**

Before you sign on the dotted line, do make it a point to visit the vendor's site. Apart from this, also research on the internet to find more about the firm, the infrastructure, safety practices and the team that works there.

This will help you assess the reliability of the service providers. If you have a reference who've worked with a vendor in the past, you can also ask them about the firm. This takes us to the next point.

### **8) Who'll lead the Team?**

You can't just have blind faith in the outsourcing team even if you're saving significantly by hiring them. Find out all that you can, including the team members who'll be working on the projects and who'll lead that team.

Learning these facts upfront will save you from several agonies at a later stage. Moreover, when you know that your business functions are in able hands, you'll be at peace.

### **9) The Service Level Agreement**

The SLA (Service Level Agreement) is one of the most crucial documents when we talk about outsourcing partnerships. At the time of creating the document, make it a point to ensure that every single detail is written clearly.

This will help you avoid any kind of confusion or ambiguity especially about the quality of the services you'll be getting. It also makes sense to hire a lawyer especially to manage your outsourcing endeavor so that you don't end up in any legal trouble.

### **10) Communication**

Communication is the key whether you're working onshore or with an offshore team. The vendors should be able to handle your queries and promptly reply without making you wait indefinitely.

Their communication skills need to be spot on without any space for cultural or other communication barriers. This ensures that they have clearly understood your requirements and can address any issue that may crop up.

### **11) Outsourcing Tips to Grow Your Business Successfully.**

During a downturn in the economy when the demands for products and services touch the lowest level and cost is sky rocketing, outsourcing acts like a savior. Majority of the companies look for cost-effective solutions to run the business operations with effectiveness and maximizing the performance of an organization during the period of recession.

The cost of labor can take a toll on the profits of a business. In the tough times your definitive choice is outsourcing to increase your productivity at the same time you will end up saving substantial cost.

When you look for an outsourcing partner, you get a grasp on the procedures and approaches that can make your business run in a seamless manner.

For instance, establishing positive relationship with the customers requires strategic skills that can become effective with the assistance of a genuine outsourcing services provider.

When you outsource services to a company which is located offshore, the target is to access better workforce that can handle your tasks with a different approach and is identified as a turning point in business. There are some businesses that try to do everything on their own without realizing that it is a counter-productive step.

When you are trying to step into a phase of growth in business, it is necessary to envisage the big picture rather than getting into the realm of trivial tasks and taking proper steps can make all the difference.

### **Selecting outsourcing service providers**

#### **Step 1 – Identify Your Business Requirements.**

The first step to outsourcing starts by answering the question: “Why are you outsourcing?” Given its multitude of benefits, there could be more than one reason for this:

- **Reduce Cost** – As discussed, the primary reason for outsourcing. Perhaps you should start small and get your feet wet by outsourcing non-essential tasks such as administrative work.
- **Increase Productivity** – In addition to non-essential tasks, you may want to outsource back office work such as Human Resources, IT and Accounting. This way you can re-align your resources only to the core functions of your business.
- **Improve Work Quality** – You could also outsource highly specialized tasks which require their own time and attention to become more effective. These highly specialized tasks include customer support, digital marketing and telemarketing.

Once you have identified the tasks you want to outsource, then it becomes easier to find the right outsourcing services vendor.

#### **Step 2 – Research on the Right Outsourcing Vendor.**

The Philippines and India are the consensus top 2 destinations for outsourcing services providers. The Philippines is widely reputed for customer support and telemarketing while India is known for world-class IT services and back office support.

But these countries have a large pool of outsourcing vendors. It would be difficult to pinpoint the right vendor. The exercise would be analogous to trying to find a needle in a haystack.

The best approach would be to conduct research. Here are some tips on finding the right outsourcing vendor:

- Contact the local regulating agency and ask for recommendations or referrals. In the Philippines, the regulating agencies are the Business Process Association of the Philippines (BPAP) and Contact Center Association of the Philippines (CCAP). These agencies have many outsourcing centers as members.
- Sign up and join focus groups in social media and ask for recommendations. There are a number of outsourcing focus groups in LinkedIn. You can join and engage with members to find out more about their experiences with outsourcing. They may also give you referrals to reputable vendors.
- Ask for recommendations from friends and associates. Given the popularity of outsourcing, for sure a few of your friends and associates know someone directly involved in outsourcing.
- Conduct due diligence. Once you’ve received some recommendations, always conduct due diligence work. A simple Google search may yield valuable results.

#### **Step 3 – Send a Request.**

Come up with a short list of at least 3 qualified outsourcing services providers. Then communicate and ask them to submit a Request for Proposal (RFP) or Request for Quotation (RFQ).

Before the service provider can comply, they may send you an RFI form or Request for Information. This is a highly detailed form which will require you to answer both general and specific questions on outsourced projects. The RFI will be used as the reference guide for making the RFP or RFQ.

#### **Step 4 – Initiate the Qualifying Process.**

Once you have received all of the RFP's do not eliminate the service providers based on its contents or pricing. Remember, everything is negotiable. As the service provider gets more details on your business needs, the quotation can be fine-tuned.

You should schedule an audio- video interview between your outsourcing team and theirs. Prepare a list of questions the answers of which your team has fully researched beforehand and discussed. The questions should cover the following topics:

- Time- lines
- Hiring Process
- Data Security and Integrity
- Systems; Processes and Frameworks
- Existing Technological Profile
- Organizational Culture
- Grading and Performance Evaluation Processes
- Current Training and Orientation Programs
- Current Career and Succession Planning Programs
- Social and Cultural Nuances
- Disaster Recovery Planning

#### **Step 5 – Contract Negotiations**

Rank the Service Providers in order of preference. Prioritize negotiations with the first outsourcing vendor and initiate contract negotiations. You should submit the following contracts to the outsourcing vendor:

- Service Level Agreement (SLA)
- Memorandum of Agreement (MOA)
- Confidentiality Agreement (CA)
- Scope of Work
- Schedule of Payments

#### **Getting Down to the Short List**

The sponsor should begin by developing a Request for Quotation (RFQ), which addresses the important attributes of the project and identifies those activities that are considered critical.

The sponsor must ensure that, within every level of the organization, the goals for outsourcing are the same and the deliverables and budget recommendations are approved by upper management. Once a selection few candidates have been identified as potentially viable service providers, telephone interviews should be conducted. This will provide the first exposure to the regulatory status, customer service level, resourcefulness and overall knowledge of the organization. Prepare for the interviews by developing a script of questions, based on the requirements stated in the draft RFQ that will be asked of every service provider. This may seem mundane, but having a consistent list of questions makes life a lot easier when it comes time to comparing each service provider.

## **Request for Quotation**

The telephone interviews are completed first before the sponsor decide which suppliers are the most desirable and provide each viable supplier with a RFQ. The RFQ must contain the essential attributes that are necessary for the supplier to develop a scope of work and to provide meaningful quotations. The RFQ should address specific requirements and reporting format. The final proposal should be in a format which will allow the sponsor to understand the timeline and budget for each functional area of the project (i.e. formulation development, method development, validation). Proposals should also be itemized by functional tasks. The sponsor should avoid proposals that only provide a single charge for the project.

The project sponsor wants as much information as possible in order to make meaningful decisions regarding which activities will be outsourced. Projects are also susceptible to the dreaded “scope creep,” which is actually the norm for lengthy projects. If a quotation does not detail charges by functional area, then the project sponsor cannot assess the budget impact that will occur when items are added, removed or modified.

When preparing the RFQ, the sponsor must be certain to include items such as deal breakers and maximum acceptable budget. If the sponsor organization has a certain way of performing tasks and this is the only acceptable method for the organization (especially if it exceeds industry norms), then the outsource provider must be made aware of the requirement early on, so that any additional charges may be assessed in a proactive manner. Also, the sponsor should avoid asking for information such as profit margin, client names and other proprietary information, which cannot be provided.

## **Due Diligence**

One of the most common mistakes made by project sponsors is a lack of overall due diligence of potential contract sites. In an ideal world, all products would be multi-sourced, always providing for built-in backup supply in case of problems. However, in the real world only a few select products are produced or even qualified at dual sites. Therefore, it is essential that a thorough due diligence be performed before any contracts are executed. The sponsor must remember that the company is essentially about to place all of its eggs into one basket.

The importance and benefits of QA audits are well understood but QA audits are only one part of what is commonly referred to as due diligence. When considering an outsource provider, the following must be evaluated, in addition to a QA audit.

Financial stability and liquidity: Will they be there when I need them?

- Equipment ownership: Will my product be produced on any equipment not wholly owned by the contractor?
- Capacity at several levels: What is the status of personnel, equipment and facility today vs. the future?

- How do the personnel respond to your inquiries: Are they slow or fast, professional or curt?
- Core business: Is the contract business unit intended to absorb overhead or is it the core business?
- Legal/regulatory: Is there pending litigation? What is the provider's regulatory history?
- Experience in pharmaceutical contract manufacturing: Is this one of the many organizations that are attempting contract manufacturing simply in order to fill capacity?

### **Final Selection**

Before final selection, ensure that all critical elements and responsibilities are clearly defined and understood by both parties. Once any questions are resolved and revisions are completed in a final quotation, a legal review should be conducted. Regardless of whether the accepted proposal serves as the rules document, or a formal contract is drafted, it is essential to have legal counsel review the documentation. Remember, contracts are not written for when things go right! Contracts should be balanced but, depending on who wrote the agreement, there may be an imbalance of rights and responsibilities. This must be carefully considered before executing the agreement.

### **Moving forward**

The sponsor must be courteous to those contractors that were not awarded the contract. One should inform them of the decision to go with another service provider and be honest when explaining why that provider was selected.

### **Outsourcing services budget**

Outsourcing services may be a risky activity to a business if not well budgeted for, the following are some of the guidelines to follow to avoid disappointments:-

#### **1. Start Budgeting Early**

Regardless of the size of your business, you should begin the annual budgeting process three months before your year end to guarantee a detailed estimate by the end of the fiscal year. Annual budgets should be thoroughly monitored and updated throughout the year, to avoid untimely beginning.

#### **2. Involve All Departments**

In order to create a comprehensive budget, members of all departments should be consulted on their expectations and requirements for the fiscal period. Each team can bring useful input to the process. The sales team, for example, will assist you with creating realistic revenue assessments. The manufacturing team can provide insight on purchasing costs and technological fees; and the research and development team can bring significant insight into industry projections and expenditures. Considering input from all departments within your company provides you with an arsenal of knowledge so you know which budget items to consider for your upcoming year.

### **3. Accurately Define Expenses**

Sales estimates can have a significant influence on cost projections, but can be complicated to accurately assess. A proper business budgeting process will help you come up with the best revenue estimates.

Evaluating recent monthly growth rates helps you decide if you are maintaining your financial goals. Staying up to date with industry guides and expert advice through publications allows you to focus on financial projections that align you with your competitors.

By keeping open lines of communication with your customers, you can develop a deeper understanding of client expectations and product satisfaction. Discussing revenue goals with your sales team can positively set expectations that promote business growth and effective budget maintenance.

### **4. Accurately Define Expenses**

Once you have defined your revenue figures, you should focus on company expenses. Many companies have expenses that directly relate to revenue such as inventory or employee services. Involve your staff to identify cost-saving strategies that will positively reflect your budget assets and liabilities.

Fixed costs, such as rent, insurance, property leases, and purchase services, should be defined in detail. While these expenses are easy to estimate, standardized policies should be taken into consideration. Comparing rates between insurance companies and distributors can be cost effective in the long run.

Employee compensation should be evaluated according to company's growth. When preparing your annual budget, projected growth for the upcoming year should be in line with revenues to establish responsible employee wages.

Estimating the total number of employees is also a critical factor to consider when making a budget. Knowing when you need to hire, what expenses are incurred during the hiring process, and what experience level is required will further optimize your business growth and overall operations.

### **5. Know Your Cash Flow**

A projected income statement is great for overall growth projections. However, it is imperative to calculate the expected cash flow within the business, as cash flow and income statement reports are not necessarily the same. If you pay your creditors faster than your clients pay you, you might need to purchase inventory in advance of sales if your acquisition time is significant. Implementing a cash flow report along with your income statement using metrics from your balance sheet will optimize your business budgeting process and result in overall capital gain.

### **Conclusion**

Although organizations might have the right talent, technology and policies in place to oversee production operations, there are times when such organizations need to outsource some operations. Outsourcing work is a tried-and-tested model and is recognized as a long-term competitive strategy for success. Outsourcing helps you get the focus back on your core business and control costs at the same time. However, this approach also introduces the threat



of imitation of an organization's products by the competitors especially if an organization outsources from businesses in the same industry. It is therefore crucial to do due diligence when selecting service providers to outsource from.

### 5.3.7.3. Self-Assessment

1. Which of the following is why it is sometimes cheaper for an outside company to make your product?
  - a) The outside company is cheap.
  - b) The outside company uses cheap materials.
  - c) The outside company is in a country with a low cost of living.
  - d) None of these answers are correct.
2. Which of these are deciding factors for companies when deciding to outsource?
  - a) Demand
  - b) Profitability
  - c) Company weaknesses
  - d) None of these answers are correct.
3. Undertake an audit of your institution and recommend services that can be audited. In your report provide a cost benefit analysis segment.
4. Outsourcing technically means:
  - a. moving functions or activities out of an organization
  - b. the delegation of non-core operations from internal production to an external entity specializing in the management of that operation
  - c. buying resources from outside a company's main domestic market
  - d. the first or second answer above
5. Outsourcing is used by an organization in the interest of:
  - a. redirecting or conserving energy directed at the competencies of a particular business
  - b. making more efficient use of worldwide labour, capital, technology and resources
  - c. lowering firm costs or to make more efficient use of worldwide labour, capital, technology and resources
  - d. any of the above
6. Under conditions of globalization, outsourcing and offshoring are not mutually exclusive; however, outsourcing differs from offshoring in that

- a. outsourcing is relative to the nation while offshoring is relative to the restructuring of the firm
  - b. offshoring represents a relocation of an organizational function to a foreign country, not necessarily a transformation of internal organizational control, while outsourcing means sharing organizational control with another organization, or a process of establishing network relations within an organizational field
  - c. outsourcing is relative to the restructuring of the firm while offshoring is relative to the nation
  - d. the second and third answers above
7. 'Developing countries' such as China or India benefit from the patronage of companies that outsource to them in terms of:
- a. increased wages
  - b. job prestige and education
  - c. increased quality of life
  - d. All of the above
8. OEM means:
- a. organizational elaborated markets
  - b. organic equipment manufacturer
  - c. original equipment manufacturer
  - d. organizational equity measures
9. One criticism of outsourcing is that:
- a. the interaction bears no flexibility
  - b. product quality suffers
  - c. there are delays in meeting the demand
  - d. the price paid by the customer is very high
10. The two underlying reasons for outsourcing are:
- a. hedging and cultural diversity
  - b. economies of scope and quality concerns
  - c. personal benefits and network access
  - d. economies of scale and lower wage costs
11. Strategic alliances are:
- a. not at all favoured by SMEs as they are perceived to be too risky
  - b. more successful than other market entry modes
  - c. one of the many ways in which firms may enter foreign markets
  - d. the most common market entry mode used by known multinationals
12. Which of the following is not an example of subcontracting?
- a. Expanded subcontracting
  - b. Vertical subcontracting
  - c. Strategic development subcontracting
  - d. Simple subcontracting
13. The five relationship phases are:
- a. awareness, exploration, expansion, commitment and dissolution
  - b. awareness, contact, planning, commitment and dissolution
  - c. exploration, expansion, commitment, exploitation and dissolution
  - d. awareness, exploration, exploitation, commitment and re-negotiation

14. The marriage metaphor is:
  - a. psychological sunk cost
  - b. what prevents companies from having more than one supplier
  - c. the process of reducing the psychic distance + increasing dependence between buyer and seller
  - d. the mutual dependency between firms forcing them to continue a relationship
15. Reverse marketing is:
  - a. where buyers invest in the seller's firm e.g. through crowd funding
  - b. where the buyer takes the initiative in searching for a supplier that is able to fulfil their needs
  - c. where the buyer is doing marketing campaigns for the seller
  - d. Internet marketing
16. In the example of seat-sourcing at Mazda, the competition for the remaining third of the Mazda seat business is based on:
  - a. meeting specifications at the lowest total price
  - b. primarily performance since the last contract was awarded
  - c. network relationship
  - d. price betting
17. In software the three types of know-how are:
  - a. software know-how, organizational know-how, financial know-how
  - b. hardware know-how, software know-how, project know-how
  - c. customer know-how, end-user know-how, programming know-how
  - d. technology know-how, project know-how and management know-how
18. Outsourcing on the American continents is supported by \_\_\_\_\_, in that there is provision with reference to workers from low labour-cost countries, such as Mexico, working in the USA or Canada
  - a. G8
  - b. NAFTA
  - c. MERCOSUR
  - d. OECD

#### **5.3.7.4. Tools, Equipment, Supplies and Materials for the specific learning outcome**

- Laptops/Computer lab
- Smartphones
- Model Organizational Policies and procedures
- Reliable Internet connection

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easytv.com

### 5.3.8. Learning Outcome No. 7. Manage customer virtual platforms

#### 5.3.8.1. Learning Activities

Learning Outcome #No...7... Manage customer virtual platforms	
Learning Activities	Special Instructions
Google search the topic: Top social sites to identify the most used virtual platforms.	
Create a Facebook page and customize it to fit an organization.	www.facebook.com
Identify the various communication channels through virtual platforms.	Train on use of direct messages, chat rooms, group chats data voice calls among others
Identify rules that affect organization use of virtual platforms from the ICT policy of the institution	
Brainstorm on security issues associated with virtual platforms.	Read more on Data Security and Control from (Makori, J.O., Mutuku, J. & Munene, K. ,2019)
Analyze user feedback on published Facebook page one of the students administrates.	

#### 5.3.8.2. Information Sheet No. 5/ LO7

##### Introduction

This learning outcome intends to enable a trainee develop an ICT policy for an institution. The trainee should be aware of all the stages involved in coming up with a draft ICT policy. The trainer must enable an environment of sample ICT policy development focusing on various national standards as well as institutional policies.

##### Definitions of key terms

**ICT Policy** is a policy document that outlines how an institution can effectively use ICTs.

##### Methods, processes/ procedures/ guidelines

All methods and standards governing ICTs in Kenya are available at [www.icta.go.ke](http://www.icta.go.ke)

##### Content

##### Identify virtual platforms

There are various virtual platforms that modern organizations use to manage customer experience. Since some platforms are more popular than others, it is important to select those that are widely accepted by current and prospective customers in order to attract as many of them as possible (Lua, 2019).

The following are the top ten social media sites of 2019 according to (Lua, 2019):

1. Facebook
2. YouTube
3. WhatsApp
4. Messenger
5. WeChat
6. Instagram

7. QQ
8. Tumblr
9. Qzone
10. Tik Tok

### **How to Beef Up Your Facebook Business Page in 2019**

Facebook is the top social media site hence the need to leverage on its existence to develop your business.

The following are some of the strategies that can be used:

#### **Update Your Page Template**

Found under Page Settings, Facebook offers a variety of Business Page templates with default buttons and tabs to help marketers showcase content in a way that best aligns with your business type and goals. While the template options look somewhat similar, they prioritize information based on your business or industry - such as promoting the “donate” call-to-action button or ability to start a fundraiser for a local nonprofit.

#### **Select the Right Call-To-Action (CTA) Button**

Facebook Business Pages include a prominent CTA directly below the cover image, which you can (and should) update based on current campaigns and offers that support your business goals.

#### **Create an Eye-Catching Cover Image or Video**

The Business Page Cover Image is prime real estate to feature attention-grabbing imagery and content for your business. If you’re not leveraging this aspect of your page effectively, consider a refresh to help promote the most important aspect(s) of your organization - products, services, offers, career opportunities, etc. - and align with your featured CTA button.

#### **Leverage Recommendations**

One of the best ways to increase your brand awareness and gain new customers is by leveraging your existing customer or fan base. Help more people find your business and begin building social proof by adding Facebook Recommendations (previously reviews) to your Business Page.



The screenshot shows a Facebook review for Safaricom PLC. On the left, there is a summary card with a 2.8 star rating out of 5, based on 9,932 people's opinions. Below this is a poll asking 'Do you recommend Safaricom PLC?' with 'Yes' and 'No' buttons. At the bottom left, there is a notification about ratings and reviews changing. The main review is by Séverine Dewailly-Jarvis, dated May 9 at 9:18 AM. The text of the review is: 'Safaricom is great until you have a problem. Then they have no idea how to solve it and ignore you until you drop the case. Terrible customer service all together. Another awful example of incompetency: "planned service maintenance". Where no one is informed and services are cut off. Clearly safaricom does not know the meaning of "planned". If you have spent money for service such as "3 hours unlimited " that money is gone! It's daytime robbery. Other example: you have great ... See More'. Below the review are 11 likes and 6 comments. There are buttons for 'Like', 'Comment', and 'Share'. An update from the reviewer says: 'Update on this review: safaricom disconnected our internet on the big box and we were never given a reason. No one could explain us why, we were ignored. So we moved on to TELKOM and so far the service has been MUCH BETTER with their fly box unlimited internet package.' There are 'Like', 'Reply', and '2w' options for the update.

## Capitalize on Messenger

Facebook Messenger is a great way to create meaningful relationships with your customers, enabling users to contact or message you directly through your Page. And if you're concerned about someone reaching out while you're offline or unavailable to respond, don't worry! Facebook has expanded the Business Page Messenger to now support 24/7 customer service and responsiveness.

Once messaging is activated on your page, brands can create pre-set greetings and automated responses to support you in off-hours and still feel accessible to users with important feedback or inquiries.

This helps marketers connect with users, even when you're offline or unavailable for immediate response (Vavruska, 2019).

4. Create a Custom Messenger Greeting
5. Turn on Instant Replies and Away Messages
6. Save Common Replies
7. Review Conversation Insights

## What are star ratings on social media?

Star Ratings are an internationally recognized symbol for quality accommodation standards. They are used in more than 70 countries worldwide and reflect the cleanliness, quality and condition of guest facilities (Star ratings Australia, 2019).

## Training virtual platform personnel

It is important to train the people responsible for overseeing virtual platform activities to ensure that they understand how to maximize the benefits of these platforms. Training should focus on both the basic set up procedure as well as respective data analytics. Below is an example of the basic steps to follow when creating a Facebook account for a business and the same process can be followed for other virtual platforms.

### How to set up a Facebook Page for your business

#### Step 1: Sign up

Go to [facebook.com/business](https://facebook.com/business) and click **Create a Page** in the top right-hand corner. You'll be greeted with several business type options including local business or place, brand or product, and cause or community. Select the type of business you're creating the Facebook Page for. If your business type falls into more than one of the category options, choose the one your customers are most likely to think of when they think about your business.



When you click on a business type, a box will open asking for a few further details, like the name of your business, your address, and your Page category. Categories are basically sub-types within the larger business category you've already chosen. When you start typing in the category field, you'll see a list of potential category options to choose from.

**Local Business or Place**

Olaf's Large Sandwiches and Deli Meats

Sandwich Shop

66 Alder Drive

Los Angeles, California

90210

310-555-5555

By clicking Get Started, you agree to the Facebook Pages Terms.

**Get Started**

When you're ready, click **Get Started**. Note that doing so indicates your acceptance of Facebook's terms and conditions for Business Pages, so you might want to check those out before you proceed.

### **Step 2. Add Pictures**

Next, you'll upload profile and cover images for your Facebook Page. It's important to create a good visual first impression, so choose wisely here. Make sure the photos you choose align with your brand and are easily identifiable with your business.

You'll upload your profile image first. This image accompanies your business name in search results and when you interact with users, and also appears on the top left of your Facebook Page.

If you're a big brand, using your logo is probably a safe way to go. If you're a celebrity or public figure, a picture of your face will work like a charm. And if you're a local business, maybe a well-shot image of your signature offering is what will allow a potential follower or customer to make the connection immediately.

Your profile picture will appear as a square on your Facebook Page, but will be cropped to a circle in ads and posts, so don't put any critical details in the corners. Once you've chosen a great one, click **Upload Profile Picture**.

Now it's time to choose your cover image, the most prominent image on your Facebook Business Page. This image should capture the essence of your brand and convey your brand personality. It will display at 820 x 312 pixels on desktop or 640 x 360 pixels on mobile. The image must be at least 400 pixels wide and 150 tall.

Once you've selected an appropriate image, click **Upload a Cover Photo**.



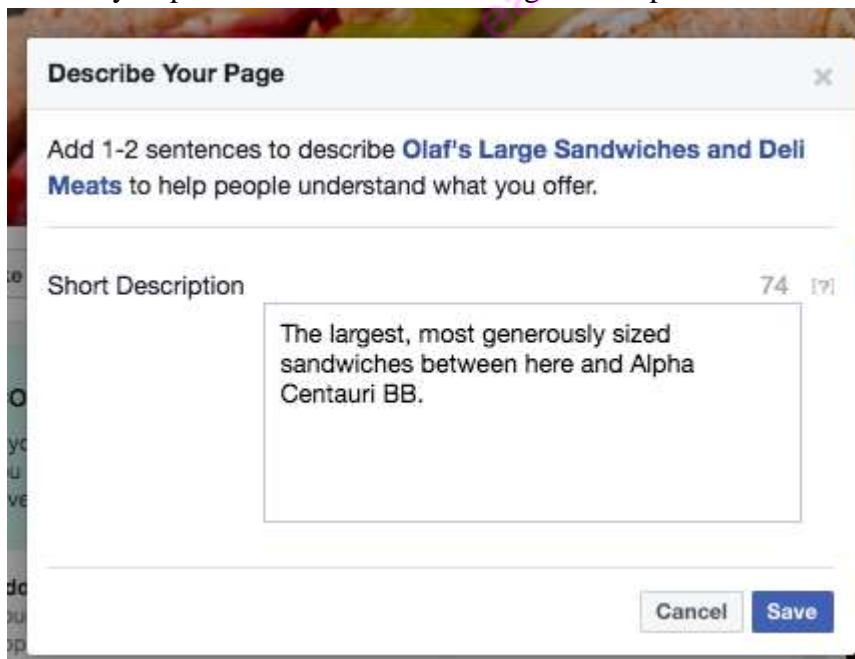
### Step 3: Explore your new Page

At this point, you'll be prompted to take a quick walk-through of a few features. Unless you're already well aware of how Facebook Business Pages operate, we recommend clicking through the prompts, just so you know where everything is. It only takes a few seconds.

Of course, while the skeleton of the Facebook Page for your business is now in place, you've still got some work to do before you share it with your audience.

### Step 4: Add a short description

This is your opportunity to tell people about your business. It should be just a couple of sentences (maximum 155 characters), so there's no need to get too elaborate here. Click **Add a Short Description**, then just share what your customers need to know as clearly and concisely as possible. You can add a longer description later on.

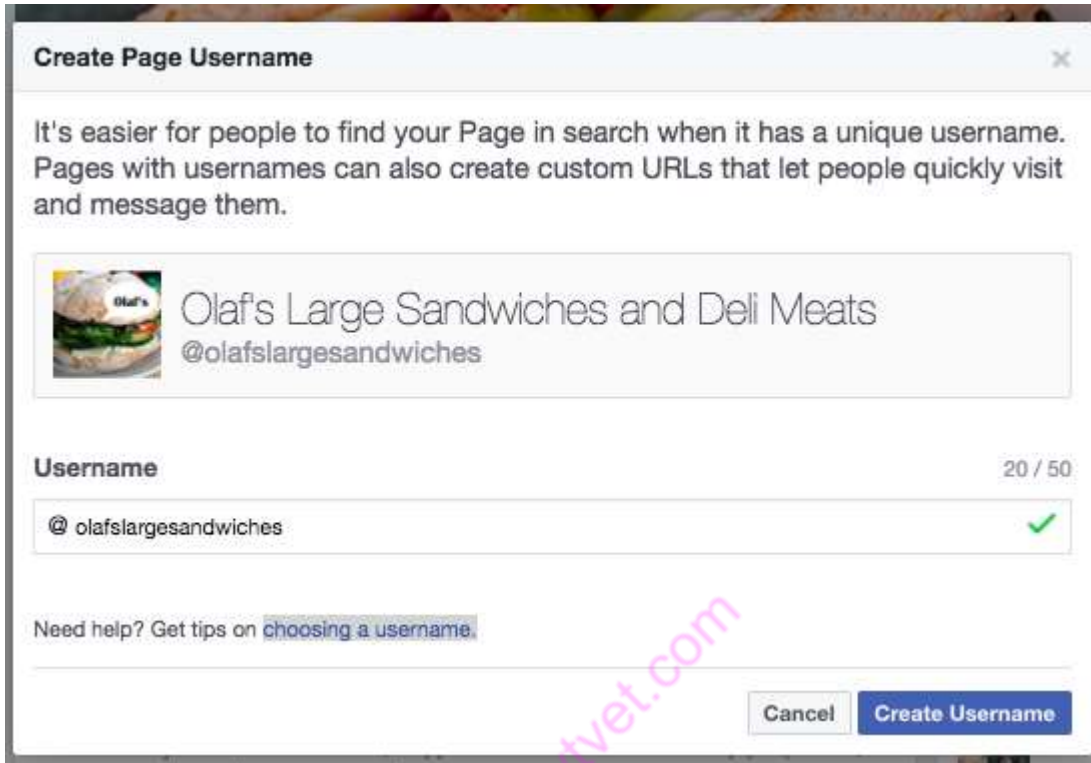


Click **Save** when you're done.

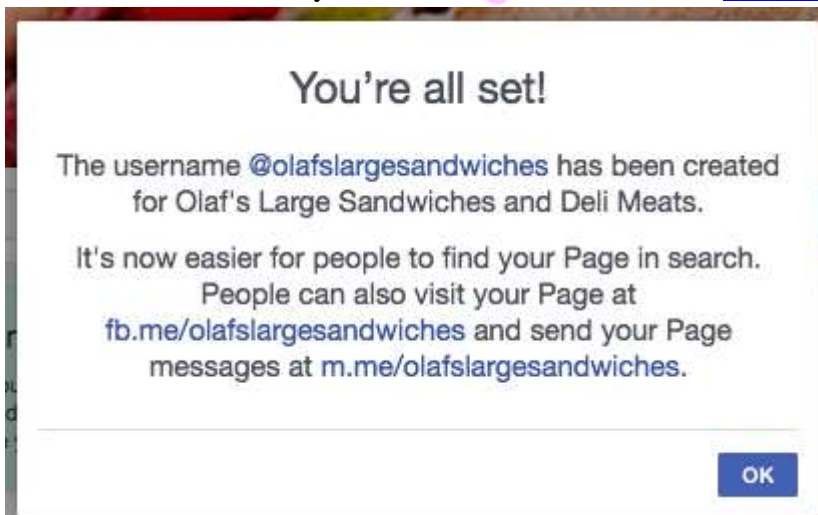
### Step 5: Create your username

Your username, also called your vanity URL, is how you'll tell people where to find you on Facebook. Your username can be up to 50 characters long, but don't use extra characters just because you can. You want it to be easy to type and easy to remember. Your business name or some obvious variation of it is a safe bet.

Click **Create a Username for Your Page** to set up your vanity URL.



Click **Create Username** when you're done. A box will pop up showing you the links people can use to connect with your business on Facebook and [Facebook Messenger](#).



Click **OK** to continue filling in your Facebook for business Page details.

#### **Step 6: Complete your about section**

While you might be tempted to leave the details for later, it's important to fill out all of the fields in your Facebook Page's **About** section right from the start. As Facebook is often the very first place a customer goes to get information about you, having it all there is extremely

important. If someone is looking for a business that's open till 9 and can't find this information on your Page, they'll surely keep looking until they find another place that's more forthcoming. It's also a good idea to list information about your Facebook Messenger protocol, such as your customer service reps' online hours and estimated response time.

To get started, click **About** in the left-hand menu of your Facebook Page.

From this screen, you can add or edit your specific business details, like your start date, contact information, and other social accounts. Depending on your type of business, you may be able to add specific details like a menu or information about your price range and whether you offer valet parking.

This is also the screen where you can add a longer description of your business. Click **Edit Story** on the right side of the Page to provide a detailed description of what your business offers customers and why they should Like or Follow your Page. This is a great place to set expectations about how you'll interact with fans through your Facebook Page for business purposes and to offer a compelling reason for them to engage with you online.

To specify your business location and hours, click **Edit Page Info** on the top right of the screen.

**Edit your details**

General **Contact** Location Hours

DRAG MAP TO REPOSITION

Customers visit my business at my street address (unchecking this box will hide your street address and check-ins)

Save Changes Cancel

Service Area

My business delivers goods or provides services in a surrounding area. (service area will be made visible on the map shown to page visitors.)

Within the following radius of my business:

2 miles.

In the following zip codes and/or cities:

Save Changes Cancel

**HOURS**

Hours

Open on selected hours

Always open

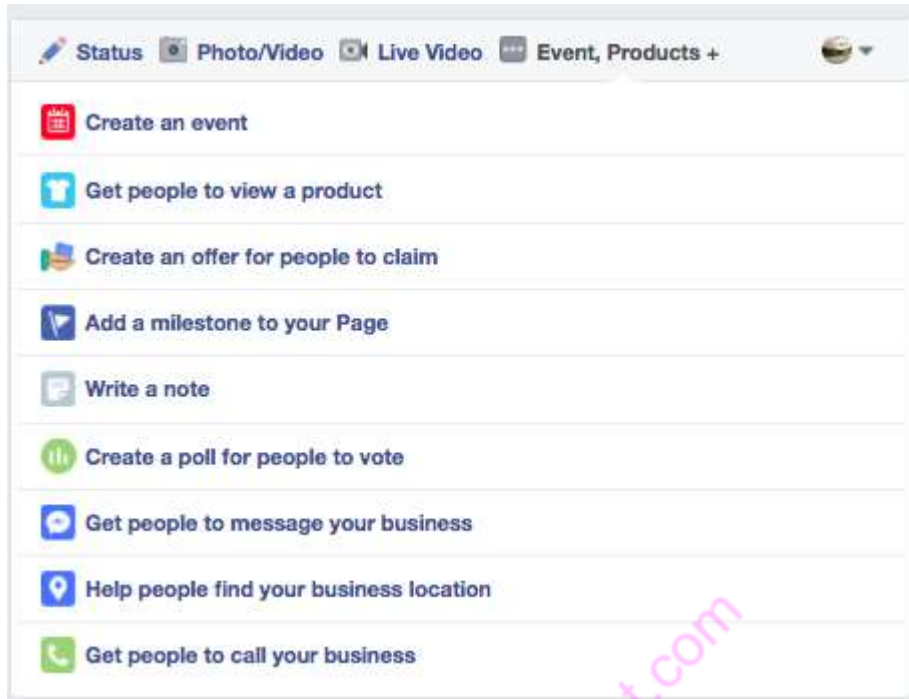
No hours available

When you're finished, click **Save Changes**.

### Step 7. Create your first post

Before you start inviting people to like the Facebook Page for your business, you'll want to make sure you share some valuable content. You can create some of your own posts, or share relevant content from thoughtful leaders in your industry.

You could also create a more specific type of post, like an event or product offer—just click through the tabs at the top of the status box to bring up all the options.



Make sure that whatever you post offers value for your visitors when they arrive at your Facebook Page, so they'll be inclined to stick around.

Your Facebook Business Page now represents a robust online presence that will make potential customers and fans feel comfortable interacting with you.

### **Step 8: Start engaging**

Now you're ready to give your Facebook Business Page a bit of a nudge. Invite family and friends to like the Page. Use your other channels, like your website and Twitter, to promote it. Add "follow us" logos on your promotional materials and/or email signature. If you're comfortable with it, you can even ask your customers review you on Facebook, too.

### **Conclusion**

Virtual platforms may give a company a competitive edge hence require proper management. Since virtual platforms give customers a chance to create content about organizations and share it, they can negatively impact on an organization if the shared information threatens the corporate reputation of the organization. This creates the need to continuously monitor information shared through these platforms and mitigating threats early enough. Firms can carry out sentiment analysis to facilitate this process.

#### **5.3.8.3. Self-Assessment**

1. Visit a local business entity, study their processes and create a Facebook page used for customer feedback and communication.

2. Analyze the customer experience of the Safaricom PLC page and write a report outlining customer complaints and positive feedback.
3. Why have you joined social media?
4. What is your brand's overall purpose?
5. What do you or your company aim to achieve with social media?
6. Who is your target audience?
7. Which social channels do they use?
8. What topics and sources of information are most important to them?
9. What events matter to them and their lives?
10. What problems can you help them solve?
11. What jobs can you help them complete?
12. What is one of the big differences between traditional media and social media?
  - a. Participatory production.
  - b. Social media reaches only a few people at a time.
  - c. The management structure of the companies.
  - d. Traditional media offers no way for audiences to communicate with media producers.
13. Which of the following is NOT a fundamental area of change regarding people's media habits?
  - a. Conversation.
  - b. Collaboration.
  - c. Choice.
  - d. Communication.
14. An important lesson learned in online political campaigns in recent years and other collaborative efforts that had online components is
  - a. People much prefer to do their own thing and not work in groups.
  - b. There are always a couple of people who disrupt the work of others in the group.
  - c. People must be able to meet face to face at times as well as online.
  - d. Social media has still not lived up to its promise of helping people collaborate.
15. A portable chunk of code that can be embedded in Web pages to give extra functionality is known as a
  - a. Folksonomy.
  - b. Widget.
  - c. Curator.
  - d. Wiki.
16. The state of spam, or unwanted commercial e-mails, in today's Internet could best be described as
  - a. Increased numbers of spam messages have made e-mail largely useless for business today.



- b. Spammers have become far more sophisticated in their techniques to avoid spam filters.
  - c. Antispam legislation and technology have helped reduced spam to a five-year low.
  - d. Spam filters have largely been ineffective and spam continues to grow as a percentage of online traffic.
17. A website that lets anyone add, edit, or delete pages of content is called a
- a. Wiki
  - b. Online forum.
  - c. Usenet
  - d. Lurker site.
18. Today the most popular social networking site is
- a. MySpace
  - b. Twitter
  - c. Weibo
  - d. Facebook
19. Creating a website or group that looks like it originated from concerned grassroots efforts of citizens is known as
- a. Lurking
  - b. Trolling
  - c. Phishing
  - d. Astroturfing
20. Two increasingly important ethical aspects of social media are
- a. Ratings and traffic.
  - b. Transparency and privacy.
  - c. Identity and honesty.
  - d. Virtue and virality.

**5.3.8.4. Tools, Equipment, Supplies and Materials for the specific learning outcome**

- Laptops/Computer lab
- Smartphones
- Model Organizational Policies and procedures
- Reliable Internet connection

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**5.3.9. Learning Outcome No. 8. Generate customer feedback report**

**5.3.9.1. Learning Activities**

<b>Learning Outcome #No. 8. Generate customer feedback report</b>	
<b>Learning Activities</b>	<b>Special Instructions</b>
Form five groups, assign each group one survey type. Consult the head of department and carry out a customer survey, analyze the feedback and give a report.	Trainees to be reminded on research methods learnt.

**5.3.9.2. Information Sheet No. 5/ LO8**

**Introduction**

Customer satisfaction is a complicated issue because it determines whether customers remain loyal to a certain organization or they see alternative companies. Many factors contribute to it, from the quality of your website and products or services to customer service to the look of emails sent to customers (Kierczak, 2019). Achieving customer satisfaction is beneficial to firms because it enables them to increase sales by attracting prospective customers and converting them into brand ambassadors as depicted in the figure below.



Source: HubSpot.

**Definitions of key terms**

**Customer Satisfaction Survey**

A customer satisfaction survey is a questionnaire that businesses send to shoppers after they have made a purchase or received a service from your business. Methods, processes/ procedures/ guidelines

**Conducting customer satisfaction survey: Types of Customer Satisfaction Surveys**

1. Net Promoter Score (NPS) Survey

An NPS, or Net Promoter Score, survey measures customer loyalty by asking a single question: How likely is it that you would recommend our company/product/service to a friend or

colleague? Customers can score from 0 (not at all likely) to 10 (extremely likely). Businesses use NPS to measure customer loyalty and overall customer sentiment, instead of feedback on a specific product or experience. NPS is widely used across many industries, so it can be a good tool to measure your customer loyalty and satisfaction against competitors. NPS can also be used to identify detractors, or customers likely to switch to competitors or spread negative feedback about your business.

### NPS Survey Template

How likely are you to recommend our company to a friend or colleague?

Not at all likely					Extremely likely					
0	1	2	3	4	5	6	7	8	9	10

Tell us more:

### 2. Customer Satisfaction (CSAT) Survey

CSAT, or customer satisfaction survey, is used to measure a customer’s satisfaction with your products or services (unlike NPS, which is used to gauge customer loyalty). CSAT surveys consist of a variation of the question: How would you rate your overall satisfaction with the products/service you received?

Customers would then choose from the following 1 to 5 scale:

1. Very unsatisfied
2. Unsatisfied
3. Neutral
4. Satisfied
5. Very satisfied

Only customers who choose “Satisfied” or “Very Satisfied” are considered satisfied customers. To calculate your business’ CSAT score, take your number of satisfied customers and divide by the total number of survey respondents, then multiply by 100. Therefore, if you have 100

survey respondents and 70 of them responded “Satisfied” or “Very Satisfied,” your CSAT score would be 70%.

$$(70 / 100 = .7) \times 100 = 70\%$$

Businesses should use a CSAT survey to measure whether or not their products and services are meeting customer expectations. CSAT surveys allow businesses to fix individual customers service issues and look at how specific products and services are performing overall. For example, if customers consistently rate a product as a 1 through 3, it needs to be improved. If customers consistently rate an item as a 4 or 5, it’s a strong product that you should promote.

### CSAT Survey Template

How would you rate your overall satisfaction with the products/service you received?

<input type="checkbox"/>	1	Very Unsatisfied
<input type="checkbox"/>	2	Unsatisfied
<input type="checkbox"/>	3	Neutral
<input type="checkbox"/>	4	Satisfied
<input type="checkbox"/>	5	Very Satisfied

### 3. Post-Purchase Survey

Post-purchase surveys are sent to customers after they have bought a product or a service from your company. These types of surveys are meant to get feedback on the specific experience the customers had with this transaction (as opposed to a survey like NPS, which gauges overall loyalty).

This type of survey should be used to pinpoint specific areas of the business that need to be improved. For example, if your NPS score is low, using post-purchase surveys helps businesses understand whether they need to focus their attention on their customer service or quality of products.

Post-purchase surveys can be open-ended, but typically they ask customers to rank different aspects of their experience on a scale of “Strongly Disagree” to “Strongly Agree” or “Poor” to Excellent.”

## Product Development Survey Template

1. What is your first impression of the product?

- Extremely Negative
- Negative
- Neutral
- Positive
- Extremely Positive

Please Explain:

2. Overall, I am very satisfied with the quality of [product].

- Strongly Disagree
- Disagree
- Neither Agree nor Disagree
- Agree
- Strongly Agree

Please Explain:

3. Overall, I am satisfied with the customer service I received from [company].

- Strongly Disagree
- Disagree
- Neither Agree nor Disagree
- Agree
- Strongly Agree

Please Explain:



#### 4. Product or Service Development Survey

Also known as Concept Testing, development surveys are sent to customers before businesses launch a new product to get a feel for how likely existing customers are to purchase the product. The goal of a product development survey is to see if the new product or service is profitable and/or receive feedback to make improvements on the product before launching it.

For this survey, you want to show customers a sample of the product you are testing, either in-person or online, including price. Then, ask questions to gauge their reactions to the product and leave space for open-ended feedback. These surveys are best to send to your most loyal customers and your highest spending customers.

easytvvet.com

## Product Development Survey Template

1. What is your first impression of the product?

- Extremely Negative
- Negative
- Neutral
- Positive
- Extremely Positive

Please Explain:

2. If the product was available today, how likely would you be to buy it?

- Very Unlikely
- Unlikely
- Not Sure
- Likely
- Very Likely

Please Explain:

3. Overall, the product is a good value for the price.

- Strongly Disagree
- Disagree
- Neither Agree nor Disagree
- Agree
- Strongly Agree

Please Explain:

4. What do you like most about the product?

5. What about the product would you change?

## 4. Usability Survey

Usability surveys, or user experience surveys, are used by online businesses to receive feedback on their website to create a better experience for the customer. These surveys usually pop up

while a shopper is on your site. They can be multiple-choice questions, open-ended questions, or even live messaging that directs shoppers to the information they are looking for.

Usability surveys are best for trying to improve the customer experience, stream-live content, or improve website navigation. There are many survey and messaging tools that can help collect customer feedback and provide a better shopping experience (Brophy, 2019).

### Usability Survey Template

1. Did you find what you are looking for?

- Yes, easily
- Yes, eventually
- No

2. How would you rate your experience on our site?

- Extremely positive
- Positive
- Neutral
- Negative
- Extremely negative

3. What can we do to improve?

### Integrating Customer Satisfaction Surveys into Your Business

Here are six steps every business should follow when setting up a customer satisfaction survey:

#### Determine Your Need

Before you begin, it is important to pin down exactly why you need this survey and what insights you want to get out of the survey results. For example, if you are trying to reduce your customer churn rate, a product development survey won't be as helpful as an NPS survey. By determining your need for the survey first, you can choose the survey type that will give you the most relevant data.

#### Choose a Medium

After determining your need and choosing a survey type, you need to pick a medium. Will you be sending your survey over email, text, in-app, on paper, or in person? Most surveys are collected over email, but some product development surveys could be done in person. Surveys that measure a website's ease of use can be done as pop-up surveys on the site itself.

#### Select a Survey Tool

Once your survey type and delivery method are chosen, it's time to pick a survey tool that can accommodate the type of survey you are looking to deploy. Obviously, price is a big

consideration, but also think about whether this is a one-off survey or if you want to incorporate customer satisfaction surveys into your business indefinitely.

### **Set a Process**

After you have your survey type, medium, and software in place, it's time to set a process for executing your survey. If you are doing a survey with customized questions, this is when you would sit down and create them. This is also when you determine during which part of the buying process shoppers will receive their surveys. Be sure to show a copy of the survey to your employees, and let them know what their role is in the process if they have one.

### **Gather Feedback**

Now that your survey is in place, start monitoring your results. Check feedback regularly for any common themes or customers service opportunities. If your survey tool gathers and analyzes data for you, make sure your employees have access to see the customer feedback. If your survey tool doesn't package feedback for you, manage the feedback yourself with a spreadsheet or CRM software and set regular times to share feedback with your staff.

### **Enact Change**

Going through the process of setting up surveys and collecting feedback is only worthwhile if you gain actionable insights for your business. Take the common themes you notice from the surveys to change business policies, better trained employees, or adjust your products and services.

### **Sharing your results**

The saying "Show, don't tell" applies. It's always better to show how satisfaction scores have changed over time rather than to simply state it. Make full use of hard numbers and data visualizations to present your findings.

Be mindful of your target audience. A report for customers and the general public is intended to showcase your results and let customers know that their voice is being heard. A report for management should be tailored to driving future success.

### **Taking action**

The insights you gather from your customer feedback surveys should guide the way you move forward. You should identify groups within your customer-base that are vulnerable to churn and find the sources of their dissatisfaction (Bock, 2019). You should also find groups with high rates of satisfaction and search for potential customers with similar traits. With the knowledge and insights gathered from your survey results, you will be able to make informed, data-driven decisions to guide you into the future.

### **Conclusion**

To run customer satisfaction surveys online, you can use techniques such as website surveys and email surveys. Benefits of running customer satisfaction surveys and analyzing their results include improving customer service and increasing the number of brand ambassadors, which leads to higher sales. Customer satisfaction surveys are most useful when analyzed on a regular basis to identify emerging trends in customer behavior (Kierczak, 2019). When dealing with customer feedback, it is important to encourage and address both positive and negative

feedback. Such feedback provides organizations with an opportunity to identify areas that need to be addressed to enhance their customer experience management efforts.

### **5.3.9.3. Self-Assessment**

#### **Conduct a customer satisfaction levels of a product or service of your choice**

1. How would you rate your overall satisfaction with us?

- \* Very satisfied
- \* Satisfied
- \* Neutral
- \* Dissatisfied
- \* Very dissatisfied

2. How likely are you to recommend our products/service to others?

- \* Very likely
- \* Likely
- \* Neutral
- \* Unlikely
- \* Very unlikely

3. When was the last time you purchased a product or service from us?

- \* Within the last month
- \* Between one month and 3 months
- \* Between 3 and 6 months
- \* Between 6 months and one year
- \* More than one year
- \* Never

4. Please rate us on the following:

(Excellent, Good, Fair, Poor)

- \* Customer service/support
- \* Quality of products/service

\* Sales staff

\* Price/value

5. How likely are you to continue doing business with us?

\* Very likely

\* Likely

\* Neutral

\* Unlikely

\* Very unlikely

6. How long have you used our products/service?

\* Fewer than 6 months

\* Between 6 months and 1 year

\* Between one year and 3 years

\* Between 3 and 5 years

\* More than 5 years

\* Have not used

7. Please suggest how we can improve our products/services to better serve you

8. Analyze your training institution undertake a customer satisfaction survey, analyze the feedback and share the results.

#### **5.3.9.4. Tools, Equipment, Supplies and Materials for the specific learning outcome**

- Laptops/Computer lab
- Model Organizational Policies and procedures
- Internet
- Smartphones

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