



Investor in Customers CX Audit Process

IIC'S CX Audit evaluates the maturity and success of an organisation's customer experience and employee engagement through analysing existing metrics gathered in-house or by an alternative third-party provider. Allowing IIC to:

- Gauge the strengths, weaknesses and potential areas for improvement of current strategies.
- Calculate an IIC score by analysing results against IIC's unique methodology.
- Benchmark scores against other IIC clients.

The audit consists of three components:

1. Analysis of existing metrics, response rates and year-on-year comparisons/trends.
2. Interviews with key stakeholders
3. Review of external presence – social media, website, marketing collateral etc - to assess how customer centric the company appears from the outside.

METRICS CONSIDERED:

- Customer Satisfaction (CSAT):
- Customer Effort Score (CES):
- Net Promoter® Score (NPS®):
- Customer Churn or Retention:
- Average Response Time (ART):
- First Contact Resolution:
- Number of Complaints:
- Customer Lifetime Value (CLV):
- Employee Net Promoter® Score (ENPS):
- Employee Tenure:

Other employee metrics may be considered depending upon how they relate to delivering CX.

A review of voice of customer and employee data is also conducted to understand reasons for satisfaction scores and to identify root causes of customer actions.



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INTERVIEWS:

Once IIC understands how well the company performs, interviews are held with key stakeholders to determine the extent to which:

- Commitment to CX initiatives are led by senior managers and team leaders.
- Staff understand their role in delivering an exceptional CX and are implementing it effectively.
- Results are communicated to key stakeholders and actions resulting from customer feedback (including any trends and root causes of dissatisfaction) are identified and implemented.
- The CX Programme has its own budget and allocated resource.
- Where appropriate, third-party suppliers engage with the programme.

Typical questions include:

- How well do you know your customers?
- How do you understand the needs, wants and expectations of your clients?
- How regularly do you look at how well the company still meets customer needs?
- How easy is it for customers to communicate with you?
- How do you/your company measure the quality of your products and services?
- How do you assess the extent to which you meet customer needs?
- How regularly do you ask your customers for feedback?
- How easy is it for customers to do business with your company?
- Do you treat customers fairly?
- Thinking of your service delivery, do you 'get it right first time'?
- What are your complaint levels like? How do you address complaints?
- How do you maintain contact with customers after they have completed their transaction?
- Is your business transactional or based on building relationships?
- Do you think customers actively recommend you?
- What are your customer retention rates like?
- How do you ensure you and your team remain customer-focused?



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EXTERNAL PRESENCE

A key part of a customer experience is how customer focused an organisation appears from the outside. By looking at marketing communications and social media IIC will look for evidence that:

- The company appear to know their target market.
- Content focuses on the needs of customers rather than products/services.
- There is a culture of anticipating needs to drive continuous improvement.
- Language used is appropriate for customers.
- There is a clear commitment to quality.
- Products/services are tailored to meet the needs of different cohorts.
- Customers are encouraged to leave feedback.
- It seems easy to do business with the company.
- Communications indicate fairness (clarity, openness, fair dealing).
- Service is proactive rather than reactive.
- Content indicates a culture of customer centricity.
- Communications cover on-going service rather than purely being sales focused.
- Content is focused on one-off sales or on-going relationships.
- Customers are encouraged to make referrals.
- The business appears to care about building relationships as much as sales.
- Is it easy to find out information and to make contact.



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IIC SCORING MATRIX

UNDERSTAND CUSTOMER NEEDS			
<i>Theme</i>	<i>Requirement</i>	<i>Observations</i>	<i>IIC Score</i>
Know Your Customers	Information on customers is accurate, stored securely and shared appropriately		
Understand Needs	Customer needs are clearly understood, communicated and acted upon		
Anticipate Needs	Customers are treated as individuals and needs are regularly reviewed		
Communication	Messages are clear and customers are able to use their preferred channels		
AVERAGE SCORE			

MEET CUSTOMER NEEDS			
<i>Theme</i>	<i>Requirement</i>	<i>Observations</i>	<i>IIC Score</i>
Product/Service Quality	The quality of output is measured against customer expectations		
Match to Customer Needs	Products and services are designed to meet customer needs not company ones		
Customer Feedback	Customer feedback is captured effectively, shared and actioned		
Easy to Do Business With	Customers are easily able to make contact find information and complete interactions		
AVERAGE SCORE			



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IIC SCORING MATRIX

DELIGHT CUSTOMERS			
Theme	Requirement	Observations	IIC Score
Treating Customers Fairly	Customers are treated with fairness, honesty and integrity at all times		
Right First Time	The majority of interactions are seamless, and mistakes are resolved quickly		
Customer Always Right	Complaint levels are monitored and are below industry norms		
Post Sales Service	Relationships are maintained after a sale and on-going customer records are clear		
AVERAGE SCORE			

ENGENDER LOYALTY			
Theme	Requirement	Observations	IIC Score
Repeat Purchases	Customer retention and cross selling is as important as finding new sales		
Willing to Recommend	Referrals form a key part of new business and are tracked through customer journeys		
Quality Relationships	Building long standing relationships is an essential part of employee DNA		
Customer Experience	Customer experience is reviewed with staff and appropriate training provided		
AVERAGE SCORE			

OVERALL AVERAGE SCORE =