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# How to Become a Customer Action Hero in 10 Steps

By Jeanne Bliss



Part 1:

*Is your Company a Customer Survey Score Whore?*

Is your company focused mainly on getting a great score? Is your commitment to customers real? Is what you learn actually used to improve your company?

Companies need to toss out everything they think about customer surveys and do a reality check of what they've actually done with the years of data they've compiled. They need to add up how much they've spent on surveys and analytics and dashboards and task forces and meetings and hoopla around presenting the results. They need to compare their effort spent capitulating and hand-waving about how bad the scores are with how much of an effort they've made actually doing something about what they heard from customers. And they need to get real...and evaluate if any substantive change has actually taken place as a result.

Then they need to **STOP** and **DO** something different.

Pavlov himself couldn't have set up a better behavior modification system. The sad news is that the behavior modified is how to get the customer to give a better score, not taking the data to heart to change the company.

In twenty-five years of arm wrestling corporations to focus on customers, what I've seen from many is that the score is the end game. First it was garnering a great 'satisfaction' score, then one for 'loyalty,' followed by 'experience.' 'Would you recommend?' has recently become the holy grail of customer measurement. The target keeps changing names—but the game's the same. The name of the game should be giving customers a memory and experience so great...that they'll want to repeat it. But sadly the game is getting that score—that darned customer score—any way possible.

Companies have spent more time chasing the elusive score than doing anything different for customers. And here's why: It's the score that's on the scorecards. It's the score that's tied to people's compensation and it's the score that determines if people get their bonus to pay for kids' braces or that trip to Disneyland or sorely needed funds to subsidize college tuition. So when the score gets tied to peoples' compensation—they'll make sure the customer treatment that it's measuring will improve, right? Well, maybe. If they could attach the scores to anything actionable within their operation they might. But for most employees, the topline survey score (which compensation is attached to) is not something they can have immediate impact upon.

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Corporations in their quest to drive customer focus have attempted to improve customer experiences by attaching things people want to the attainment of a good score. Pavlov himself couldn't have set up a better behavior modification system. The sad news is that the behavior modified is how to get the customer to give a better score, not taking the data to heart to change the company. Often it's the score and how to get a better one that's focused on more than customers or their treatment.

## LET THE BEGGING BEGIN.

Here's how my own recent survey experience went, complete with tactics to garner the best score possible: "Hello, we're calling from XYZ auto dealership where Mr. Bliss recently had his car serviced. Is Mr. Bliss in?" I tell the caller that he is not. "Well, do you know how his last visit to our service shop went?" "Yes, I know a little bit about it," I say. This was good enough evidently, as the survey-taker immediately launched into a litany of questions, wanting to know each time, "would your husband rate his experience as being completely satisfied?" Obviously the fatted calf went to those with the most 'top box' responses—to those with customers who were the most completely satisfied—whatever that means. Even if the person not experiencing the service responded (as in my case)—that was good enough if it yielded the right response.

Having declared that my husband's experience was pretty good (and who knows if he would have said so for sure), this next question came: "If our corporate headquarters calls, would your husband again say that he was completely satisfied to these questions?" "Probably," said I, again not knowing for sure if this would be the response. This again proved to be good enough to dump us into the next level of survey-dom. Two days later our phone was ringing off the hook from the automotive corporations' survey company. This time I didn't answer the phone. A check of our caller ID shows fifteen calls have been placed to ask Mr. Bliss (or me as his proxy) to confirm how 'completely satisfied' he was.

The cynic (and realist) in me surmises that when their phone screening yielded a completely satisfied score, the dealership passed on my husband's record to receive the corporate survey. And getting a good score ranking from corporate had even higher stakes. Perks and privileges from the automaker, such as going on the exotic dealer trip, are likely to be attached to how many 'completely satisfied' answers they received. Other such perks range anywhere from getting the newest models first to getting customer leads to getting to pick a new toaster out of a catalogue. The higher the scores, the better the prize yielded.

## AND THEN?

# But beyond the rigor of running surveys, there is not much rigor in doing anything with what's learned.

Any time a business asks a customer how they're doing, it should be for the purpose of doing something with that information. But that's just not happening. Heck, companies are so exhausted and numbed from customer survey feedback collection that just getting the report out is considered a great feat. And that's where it lands—in a brick—that big 4-inch report of survey data lands at the feet of the people who are supposed to read the data, analyze it and understand how it relates to them, weep about it a bit and then go fix things for customers. But beyond the rigor of running surveys, there is not much rigor in doing anything with what's learned.

## NO SACRED COWS: GAMING THE NETPROMOTER™ SCORE

There is a frenzied optimism on the simplicity and potency of the new NetPromoter™ concept where understanding if a customer would recommend you is key to the score. But beware, if your end game is simply pushing for the greatest NetPromoter™ score—you're completely missing the point.

As with any customer feedback system, it's what you do with the information that's key. What will you do when a customer won't recommend you? Will you find out why not? Are you collecting all of that information from dissenters and identifying the big things that are broken in your business and fixing them? Are you identifying and holding those who have declared that they would recommend you close and building stronger relationships with them? Have you spent the time to find out what they really love about your business and then pinpointed which part of your operation and in what geographies those actions are coming from? Have you created systems and processes to reliably replicate those loved experiences across your enterprise?

Yes, it's early in the game on this scoring concept. But just know that at the end of the day this may just be the latest of your corporations' customer scoreboards. And just like someone we become tired of dating, your company may find it's time to change from even this shiny new dating partner (err...measurement system) when the sizzle is gone (read: fake hoopla) and no movement occurs in the count of customers who would refer versus those who would not (because nothing was changed from what you could have learned about the business) and a new measurement system arrives to take its place.

## Part II: *How to Become a Customer Action Hero: Act More, Survey Less*

To become a Customer Action Hero to your customers you don't have to leap tall buildings in a single bound. Instead, act more and survey less. Becoming a hero to your customers is more about reliability than heroics. If they could just count on you...to always deliver, to always be there, to fix what ails them, to really care...well, things would be different. You'd have customers who desired the experience you deliver so much that they keep coming back again and again for more. And recommend you? No prodding necessary. They'd be singing your praises from the roof-tops.

Yes, customer listening is as old as the hills. Unfortunately as my mother used to tell me, most corporations' ears are full of wax. All the money in the world that you throw at that survey won't do any good if there's not a commitment to act on what you hear.

BEFORE YOU DON YOUR ACTION-HERO SUIT AND GET DOWN TO THE BUSINESS OF DOING, FIRST ASK THIS:

Is your leadership commitment real or lip service?

CEOs that champion a customer agenda have clarity about where they want to take the company and what they want it to become for customers.

You can't get there from here if leaders won't pony-up and hold people accountable for customers and customer experiences. You've got to get down to the nitty-gritty with your executives to find out if they will put their skin in the game to demand accountability for fixing those things that are getting in the way of your customers' repeat business. If they won't...I won't say it again...but your company may be a you-know-what (read the title of part one again if you don't get my drift).

CEOs that champion a customer agenda have clarity about where they want to take the company and what they want it to become for customers. They are not timid about challenging ideas or

pushing separate operating areas to work together. They demand engagement and will work hard to make sure that issues are worked out when there is potential confusion or dissent about changing direction or taking new, uncomfortable actions.

- ◉ Does your CEO clearly articulate what he/she wants the company to become for customers and constantly reinforce and drive the company in that direction?
- ◉ Is there a commitment for organizational transformation, not some one-off tactics and silver bullets?

These leaders grasp completely that company transformation will not happen with a public proclamation and a great kick-off memo (Sad, but true, how many of us have received those?). The CEO recognizes the scale of this work and that many people need to be assembled to bring about the level of wholesale change required. For example, in Whirlpool Corporation's transformation, it was understood that it required not only an emphasis on customer loyalty, but also on the skill sets for bringing new competencies into the organization, and engagement and inclusion among all company levels.

- ◉ Has your CEO layered this work onto someone's already over-full plate, or is there recognition that this is a critical job for the organization that requires an immense time commitment?

CEOs with customer focus demand accountability for customers. The metrics and performance requirements are clear. Regular accountability exists for trending and tracking customer complaints by category and setting metrics for improvement. Customer losses are understood and accounted for. The key customer interactions are known down to operational metrics which the CEO tracks as fervently as the number of products sold—because in those

moments experiences are made or broken. There are leaders out there who want this and demand it so they know what's happening with their customers. Is yours one of them?

- ⦿ Does your CEO actively hold people accountable for customer performance? Is there clarity in what's expected and does the organization practice discipline around identifying what should be measured and managed?
- ⦿ Does your CEO play an active role in understanding and participating in the rigor of aligning the company when necessary?
- ⦿ Is your CEO willing to suspend the usual short-term expectations of immediate results to have patience for the customer work to take hold and yield results?
- ⦿ Have the resources been applied so that the roadmap is grounded in the reality of what the company can achieve and fund?

This work is not for the mild-hearted or the quarterly-inclined. The CEO must personally have the belief and commitment that this is the right course. The company must hear that the company ticker on proclaiming something a success or failure has a much longer timeline here. They can't bail in the first year because the results don't come as simply and cleanly as seeing response rates on a marketing campaign, tracking sales goals or the number of hits on your website. When progress starts to waver (and it will) people will need leadership reinforcement to stay the course.

The reality of why many companies rely on surveys so heavily is that they haven't wrestled with these leadership points. As a proxy for customer commitment, surveys are sent year after year. And when the results come in the skirmish begins and then ends...in about a month. And that burst of hysterical energy is just not enough to make heads or tails out of what's important to your customers and how you need to change the company to give it to them.

SO, THE BOSS IS ON BOARD AND YOU MAKE A MAD DASH TO THE PROVERBIAL PHONEBOOTH. HERE ARE 10 STEPS TO MOVE FROM CLARK KENT TO CUSTOMER ACTION HERO!

## **1 ELEVATE CUSTOMERS AS AN ASSET OF YOUR BUSINESS.**

Right now, you can probably recite where you are in meeting your sales goals. Do you know as much about your customer goals? These are the counts of customers in and customers out, a clear accounting for customers by profitability and revenue by segment, customers who renewed with you and why, and customer referrals. This is about elevating customer metrics into the strategic stratosphere—to make the knowledge of customer gains and losses as widely and wildly understood as if you made quarterly sales goals. If you're not keeping track of this end game, of the quality and quantity of customers voting to stay or leave based on the experience you deliver, you will continue your dependence on survey scores and the fake number quest. You need to essentially wage a campaign to power the customer metrics onto the strategic agenda of your business. Get your CEO to start asking for these with the same vigour as sales performance:

- ⦿ New customers, volume and value
- ⦿ Lost customers, volume and value
- ⦿ Renewals and why customers are renewing or continuing to buy from you
- ⦿ Referrals by customer segment
- ⦿ Profitability and revenue by customer segment

It won't be pretty in the beginning as you begin to collect this information. Yes, the databases don't connect and people will come up with a hundred reasons for not doing this. But you need to stay the course here! We have made the 'customer work' just too darn complicated—and it won't be until there is a simplified way that corporations have to define 'Score!' that CEOs and their boards will actively begin to even know what to ask about.

## 2 CREATE A SYSTEM TO TRACK AND TREND COMPLAINTS AND COMMENTS.

Stop doing regression analysis and all of the other crazy things you do with the customer survey data that doesn't connect to anything operational in your business! Instead, channel that energy into listening in on customer calls for a few days. As you listen, create categories of issues, which will start to repeat by hour two of your listening in. And before you spend a single cent on technology, get your leaders to listen in, acknowledge the categories, and agree to accountability by category. Then move on to establishing a consistent way of capturing the issues for every channel with customer contact: phones, sales, web, etc.

Companies have been dancing around doing this for years...and it is time to commit. This will give you the real time answers to what your customers like and don't like about their experience with you. And when you get that database in order, you can take this further to show the financials and opportunity cost attached to ignoring customer issues. Many companies now are attaching complaints to customer records and can actually show the movement of customers in declined spending and defection per problems encountered. Now that will get you traction and drive change in operational performance faster than looking at a survey score and trying to figure out what it really means.

### **3 LISTEN TO THE FRONTLINE. REGULARLY.**

Your frontline is hearing from your customers every single day. And if you don't listen to them regularly you're missing one of the easiest and most potent ways to understand the experience you are delivering to them. At Lands' End, we did something very simple which you can begin doing immediately. And it doesn't take technology or a task force or anything more than the will and commitment to do it. On a monthly basis, select 10–20 people from the frontlines of your company, from sales or service or the front desk. In fact you should rotate people in from the different groups. Invite them saying you want to hear from them on what customers need, and what they need to serve customers. Put the chairs for the frontline in a circle. Put a chair in the middle and have your CEO sit in it. The frontline talks, the CEO listens, someone takes notes. You take action. The end. This was our 'improvement strategy' for years at Lands' End during the formative period in the 1980's and 1990's when we were making our way into people's hearts. It's simple and it works. Try this.

### **4 PRIORITIZE AND FIX THE TOP 10 THINGS BUGGING YOUR CUSTOMERS.**

Inactivity from the survey data exists because people don't know what to work on. Some companies are able to ask the survey in a way that asks the question and also asks the customer to rank its importance. If you're still doing surveys, this is the best way to go because you can prioritize the issues. When you start tracking and trending complaints, this is even clearer because the volume of complaints will identify the most important issues. The key is to focus. In one financial services company, we called these customer issues the "cracks in the foundation" of the business. There were nearly a hundred of them. But we focused on fixing ten every six months. These became the shared responsibility of leaders and their compensation was tied to it. And it got action. We make the customer work way too complex. Just start listening to customer issues, prioritize them and fix them. End of story.

## **5 ATTACH ACCOUNTABILITY TO OPERATIONAL METRICS, NOT SURVEY SCORES.**

Your customer experience is made up of a series of contact points that should each have a set of operational performance metrics attached to them. Organizations think that they are putting “teeth” into their customer commitment when they attach people’s bonuses to the survey scores, but the best way to do this is to attach recognition to the achievement of operational performance that they are in control of. The best customer companies have demystified roles and responsibilities and can identify the minimum acceptable performance and target performance at key customer interaction points. And they identify shared accountability across the silos in these contact points.

## **6 DON'T ASK ANY QUESTION WITHOUT KNOWING HOW YOU'LL USE THE ANSWER.**

Look, you’re taking out time from your customers to ask them questions. You’d better know what you will do with the information. That means assigning accountability by operating area for diagnosing what customers mean, identifying the issues, establishing a baseline of performance and improving. It’s just too easy today to have the survey results be presented as some sort of ‘event’ that leaders attend, nod their heads in a convincingly disconcerted way over and then leave to do nothing about what they heard.

## **7 CONDUCT A MONTHLY CUSTOMER LOSS REVIEW.**

On a monthly basis, gather a list of customers who have left then assign your executive ranks to call 5–10 of them each to find out why they left. Compile the customer profitability information about those customers who left as well as any other information so there is a picture painted of the flesh and blood customer or account who felt they couldn’t do business with you any longer. In the meeting, discuss what the issues were that were driving customers away and build an action list with names and dates attached to it. I can guarantee you: the memory of hearing customers expressing their pain from the treatment you gave them will inspire people to get their act in gear.

## **8 BUILD YOURSELF A 'CUSTOMER ROOM': USE PUBLIC ACCOUNTABILITY TO DRIVE THE ACTION.**

Public accountability can be the promised land for getting action on what you hear from customer surveys, customer complaints and feedback from the web. Simply designate a room forever more as “The Customer Room.” On the walls of the room, map the guerrilla metrics, the trending of your customer issues, what you are hearing from customers on the web and the top ten operational metrics related to the biggest issues your customers want fixed. On a quarterly or monthly basis, your President should walk the room, standing before each category of information. The words spoken: “Why is this happening, who will fix it, and when?” When the data is organized by region and/or operational area, I can tell you from experience that the friendly horse race of not wanting to be last in performance and wanting to be first will push people to move from talk to action.

## **9 CREATE AN ANNUAL CUSTOMER PLAN.**

Today, here's how annual planning goes: each division or silo pulls together their own separate budgets based on their individual objectives for the coming year. They get turned into Finance who merges them into a corporate plan. When the inevitable cut direction comes to “shave 10% off the top,” the customer initiatives, training or anything ‘soft’ is lopped off.

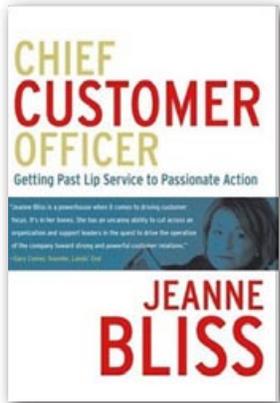
Instead: make sure that you have finished any customer surveys or customer probing work at least PRIOR to your annual planning cycle. This way you will have the information you need to determine the investment plan. Pull together the information to know the flow of your customers into and out of your business—the leaky bucket analysis—to know your segments of customers and how your actions as a company are affecting them. As an aligned leadership team, identify the segment of your customer base that is most profitable and understand the issues driving some of them away. Also, identify the top issues pervading

customer contacts across all segments. Again, as an aligned leadership team, prioritize the most important issues and select them as company-wide priorities for the following year. But you can't stop here—because this is where these well-intended proclamations of prioritizing the customer fall apart. Continue leadership alignment with planning these shared priorities in unison across the division and silos.

## **10 REDIRECT THAT SURVEY BUDGET.**

Upon reducing your survey habit, you will likely have freed up considerable resources—sometimes millions of dollars. Don't lose sight of those funds! Take that budget and redirect it to fixing the things you know are broken, that you've always known were broken...and that won't go away no matter how many surveys you send to your customers.

Preaching's over. Now **GO DO SOMETHING!**



## BUY THE BOOK

For more details or to buy a copy of Jeanne Bliss', *Chief Customer Officer: Getting Past Lip Service to Passionate Action* [click here](#).

## ABOUT THE AUTHOR

Jeanne Bliss spent 25 years reporting to the presidents of Lands' End, Allstate, Mazda, Coldwell Banker and Microsoft in the challenging quest to drive customer focus across the silos and eventually to customers. This manifesto is adapted from her book: *Chief Customer Officer: Getting Past Lip Service to Passionate Action*—a leadership roadmap and guidebook on how to get this done. She runs CustomerBliss, coaching leaders on how to make customers a priority of their business and giving keynote speeches around the world. Get practical tools and a reality check audit on where you are in your journey to becoming a Customer Action Hero at

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