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| **Building Customers for Life℠****Account Management Profile Strategy****Listen - Understand - Act** |  |
| **No two customers are alike, so learn how to support the needs of each with the same result - exceeding expectations and winning long - term loyalty.** |
| Within the B2B environment the roll of account management is critical to retaining key customers (Tier I) and growing the value of your organization’s product & services. Account Management Profile (AMP) of key accounts provides crucial CX intelligence to effectively retain and grow these accounts. An effective AMP strategy requires consistent customer feedback, if all internal functions are to be aligned and support the role in the pivotal relationship of retaining/growing your key customers. A comprehensive AMP of your key customers and how you and your competitors are performing in delivering against customer needs – both now and in the future – is essential.  |
|  | 5 | **Critical Components to Successful CX Strategy** |
| **1** | **Segmentation | Survey | Benchmark** |
| Take a deep dive into your customer base and segment your account into different Tiers (Tier I - Tier II - Tier III, etc.) levels with contact title. Conduct comprehensive service/product satisfaction loyalty survey including benchmarking against competitors. The expectations of each Tier account will vary, so will the level of service/support that should be expended to consistently exceed those expectations. The survey questionnaires must measure both satisfaction **(rating level of satisfaction)** and loyalty **(willingness to recommend)** products-services-company. Also, compare your organizations (product-services-company) versus your competitors (better-same-worse) and provide for open-ended comments as to key reasons for their ratings. In summary, Account Management Profile of your key accounts (Tier I) is essential to retaining and growing this base.**Steps:**1. **Tier I:** Accounts that provide the highest revenue and are strategic accounts - 80/20 rule

(80% of your revenue, representing 20% of your customers)1. **Tier II:** Accounts representing the next 10% of revenue
2. **Tier III - Tier ‘N’:** Your remaining accounts (last 10% of your revenue)
3. **Identify the Decision Makers Title:** - Executive Management
4. **Identify the Recommenders Title:** - Middle Management
5. **Identify the Influencers Title:** – Frontline Select Key Employees only
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| **2** | **Employee Engagement | Recognition | Certified Training** |
| Conduct a 360 segmented Employee Alignment Survey with your customer-facing groups comparing their “perception” of the level of customer satisfaction/loyalty with their services vs. the “actual” customer ratings. The results of this assessment provide for an important insight into customer views and actively engages your employees to provide exceptional customer experiences each time. This is the foundation for an employee recognition program that is based on actual customer ratings, eliminating employee complaints that the ratings are subjective management goals. Also, this AMP component requires continuous soft skills certified training to provide the foundation for delivering consistent exceptional customer experiences (CX). |
| **3** | **Corrective Action | CX Analytics | Support Standards** |
| Conduct consistent corrective action for the identified problem issues and confirm corrective action was acceptable. Customer satisfaction surveys must provide for action alert situations that capture an unexpected revenue opportunity or reveal a problem situation. The Action Alert includes a full description of the situation, good or bad, and pre-determined escalation procedures are executed so that applicable action can be taken. Also, conduct CX Analytics (KPI, Predictive, Regression, etc.) that includes at minimum key driver analysis that identifies the key survey questions that drive satisfaction/loyalty. Further, must collect unstructured/unsolicited feedback both speech and text analytics to achieve a complete view of CX to drive corrective action. Lastly, implement support standards that certifies your service organization from both CSAT and service operations criteria. This AMP component insures that a consistently positive CX is being delivered. |
| **4** | **Independent 3rd Party CX Recognition | Provider of World Class Service** | **Customer Bill of Rights** |
| Earn CX recognition through industry independent 3rd party certifications/awards. Become a recipient of NorthFace ScoreBoard (NFSB) Award for customer service excellence and CEMPRO Award for superior employee softskills training. **Join world class service providers such as:**Avaya Inc., Acist, Alpha Wasserman, Alfresco Software Inc., Analog Corp., Boston Scientific, Bruker BioSpin, Citrix, Cohesity Inc., Corning Optical, CA Technologies, Deltek, Diagnostic Stago, ERT, EMC, Flir Systems, Hologic Inc., Haemonetics, Hewlett-Packard, Illumina, IBM Companies, KVH, Kronos, Masimo, Mouser Electronics, Micro Focus, Nutanix Inc, NetScout, Oracle, Pitney Bowes, Rubrik, Sony, Veritas Technologies, Wolters-Kluwer, Yaskawa America Inc., Zeus Industries, Zoll Medical, and many others.A close up of a sign  Description automatically generated A close up of a logo  Description automatically generated A picture containing tableware  Description automatically generated  A picture containing clipart  Description automatically generated A picture containing clipart  Description automatically generated   A picture containing clipart  Description automatically generated A picture containing clipart  Description automatically generatedA picture containing clipart  Description automatically generated A picture containing clipart  Description automatically generated A picture containing clipart  Description automatically generatedA close up of a sign  Description automatically generated  A close up of a sign  Description automatically generated | NorthFace ScoreBoard Award**Customer Bill of Rights**Established - 1998Listen - Understand - ActAdopt a Customer Bill of Rights reviewed and approved by Executive C-Level Management Team.**Article I:**Companies agree to provide goods and services that will consistently exceed their customer’s expectations.**Article II:**Companies agree to provide their employees a workplace where employees are motivated, trained and skilled, customers are valued, and relationships are maximized.**Article III:**Companies agree to recognize and reward their employees who consistently exceed their customer’s expectations.**Article IV:**Companies agree to consistently measure the level of customer satisfaction with a company’s product and services.**Article V:**Companies agree to consistently report levels of customer satisfaction for products and services to executive management and the enterprise.**Article VI:**Companies agree to adopt change management strategy to consistently provide corrective action to poor performance in products and services.**Article VII:**Companies agree to consistently measure their performance versus industry standards and/or best in class company performers.**Article VIII:**Companies agree to consistently validate their customer satisfaction results via being recipients of industry awards-certifications and/or independent audit of their customer satisfaction results.**Article IX:**Companies agree to a chief customer advocate position, reporting to the President whose sole responsibility is the ombudsmen for customers, and who consistently reports the level of customer satisfaction on product and services and provides the corrective action plan to the executive management team.**Article X:**Companies agree to annual review of their customer experience management strategy (CX) which must include Article I thru Article IX.A drawing of a face  Description automatically generated |
| **5** | **Partnering 4 Success - Add Value for Customers** |
| The AMP basis for this methodology is to maximize the value of your product/services especially within your key accounts. Your AMP team (sales-marketing-service engineering - etc.) must clearly identify the value-added benefits (decreased costs - increased productivity-increased profits - new revenue source from professional services - etc.) from the use of your products/services. Conduct a formal Partnership 4 Success review (briefing) include reporting by the segmentation levels of CSAT, outstanding issues, corrective action taken and provide history of value-added benefits. This AMP component will transform your organization from a “vendor” to a “trusted advisor” role that will insure long term customer loyalty. |
| **Having an independent party’s view will provide you with a key building block for creating long-term profitable relationships.** |
| **Exceeding Customer Expectations - One Experience at a Time℠** | CRMI is your Customer Experience Management (CEM) partner. Empower your organization with the knowledge and training for delivering the ultimate customer experience. Build loyalty, drive revenue and maximize client satisfaction with a proven CXDNA Playbook Strategy.**Ph: 978-710-3278 | Email:** **drivera@crmirewards.com** **| Website: www.crmirewards.com** |