



WEBCAST SERIES

Case Studies: Award-Winning CEMDNA Playbook Strategies

May 14, 2015

2:00 pm-3:00 pm EDT



Featured Speakers



Fred Bonaventura
Director, Global SPARC Technology
Service Center

ORACLE®



Dennis Fitzgerald
VP Customer Satisfaction

YASKAWA



Anthony Daubenmerkl
VP Global Client Support

Metalogix

CEMDNA Playbook StrategySM



The Road to Customer Loyalty

How Oracle Systems Support
Improved Customer Satisfaction



Fred Bonaventura
Director, Global SPARC Technology

ORACLE®

About Oracle

Unleashing Innovation by Simplifying IT

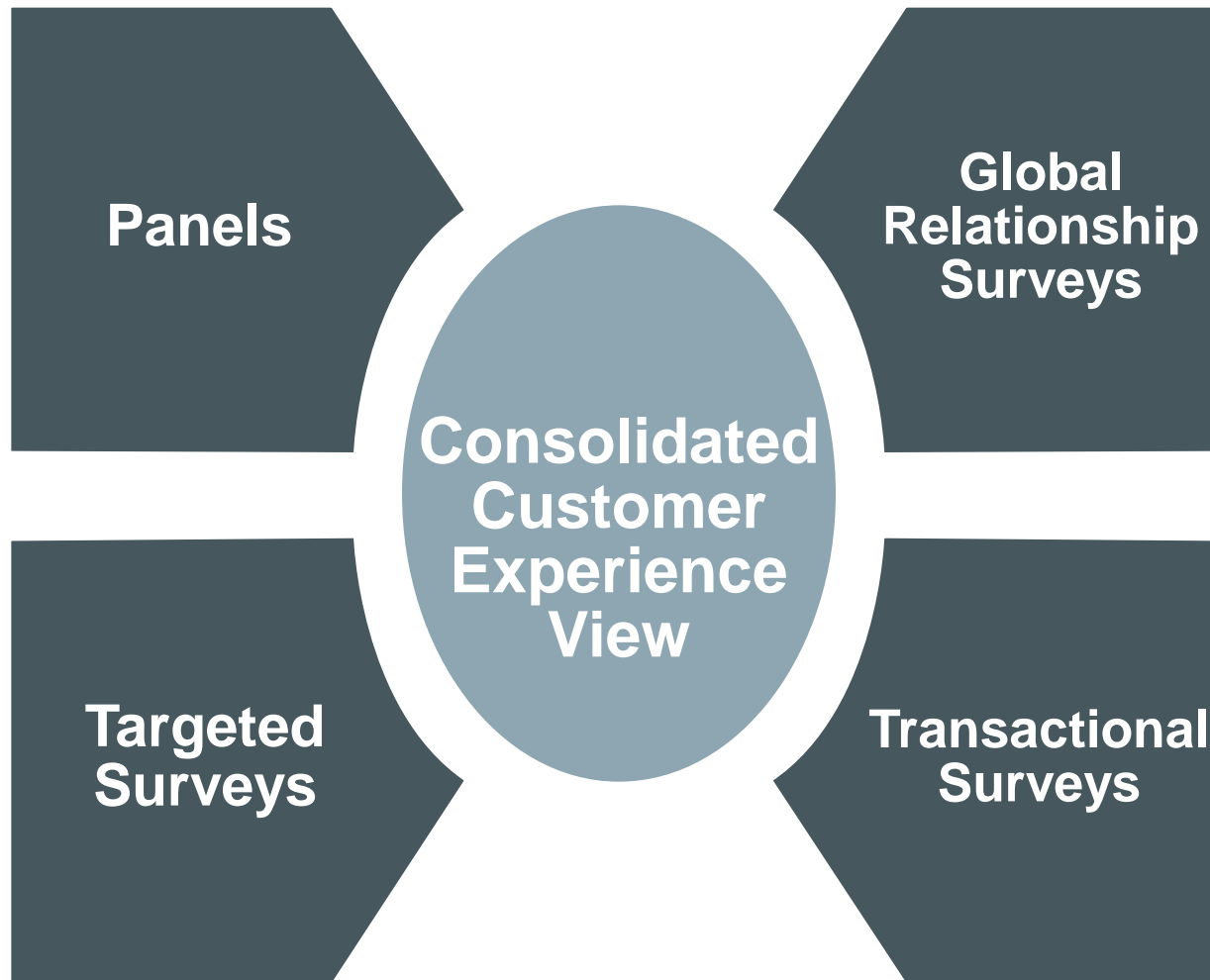


Oracle offers an optimized and fully integrated stack of business hardware and software systems. Oracle engineers hardware and software to work together in the cloud and in the data center – from servers and storage, to database and middleware, through applications.

The Satisfaction Ecosystem



How We **Measure Success**



Global Systems Support **Approach**

KEY ELEMENT

KEY BENEFIT

Transform how we interact with our customers in every situation to provide a world-class service experience.

Focus on each customer's business needs, not just on the product(s) involved in the SR.

View **"Customer Satisfaction"** as the **first step** toward Loyalty and Delight.

Build upon continuous improvements that reflect engagement and commitment from our customers.

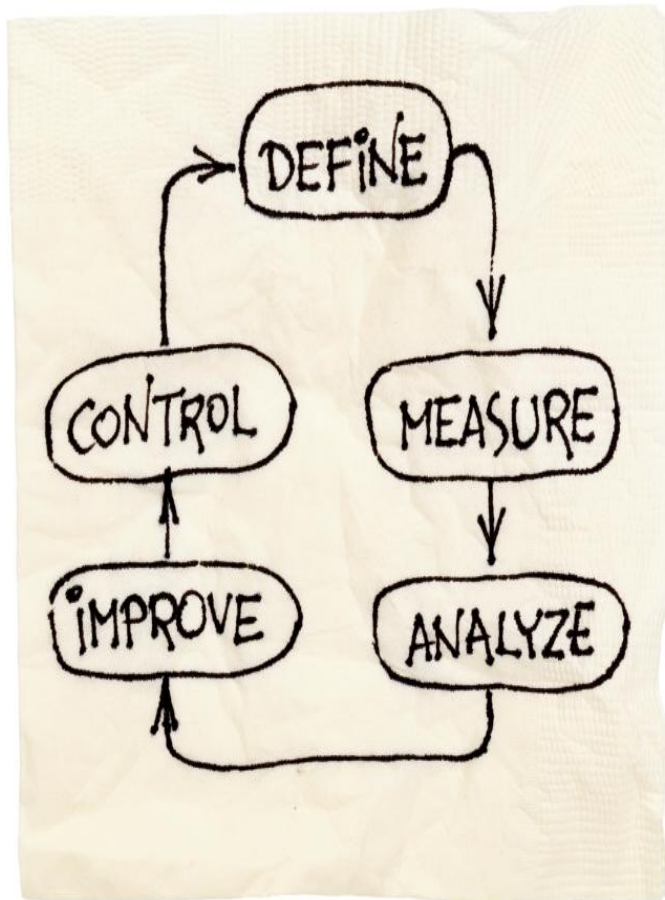
Improve collaboration across Oracle teams and **break down any barriers** to great customer service.

Drive efficiency and effectiveness through teamwork, partnership, and a shared vision of our future state.

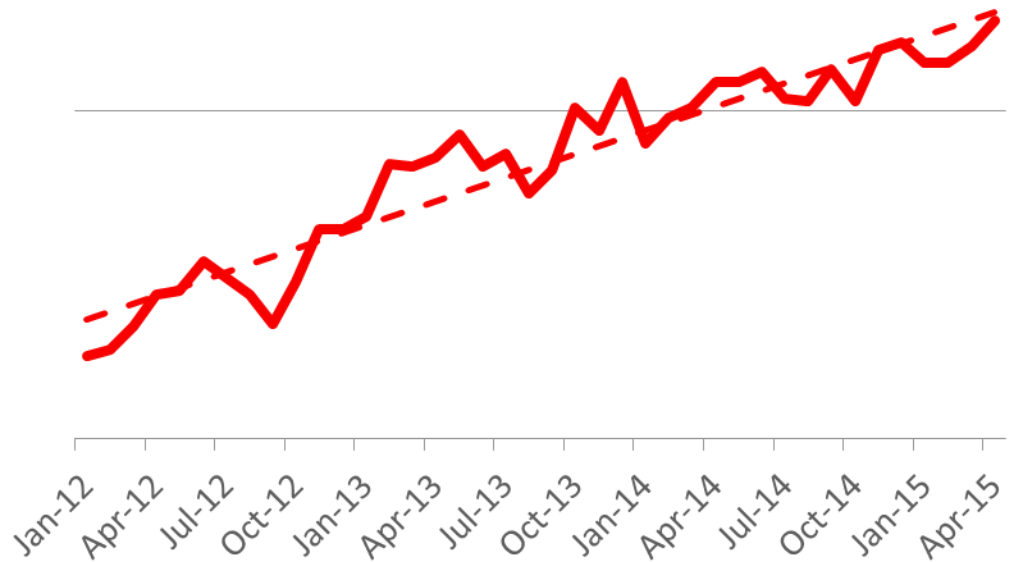
Drive towards **outcomes that demonstrate** our **service commitment**.

Become a key differentiator in purchase and renewal decisions, driving long-term business relationships.

Outcomes Through Execution



Overall Systems Support Satisfaction



Safe Harbor Statement

The preceding is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Award-Winning CEMDNA Playbook Strategies



Dennis Fitzgerald
VP, Customer Satisfaction

YASKAWA

Yaskawa Electric Corporation

(B2B)



Yaskawa Electric Corporation Kitakyushu, Fukuoka, Japan

- Founded: 1915
- Sales: \$3.3 Billion
- Associates: 13000



Yaskawa America, Inc. Drives & Motion Division Waukegan, IL, U.S.A

- Founded: 1967
- Sales: \$635 Million
- Associates: 1500



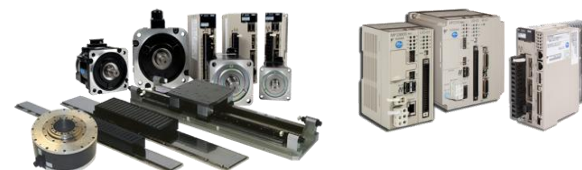
Robotics



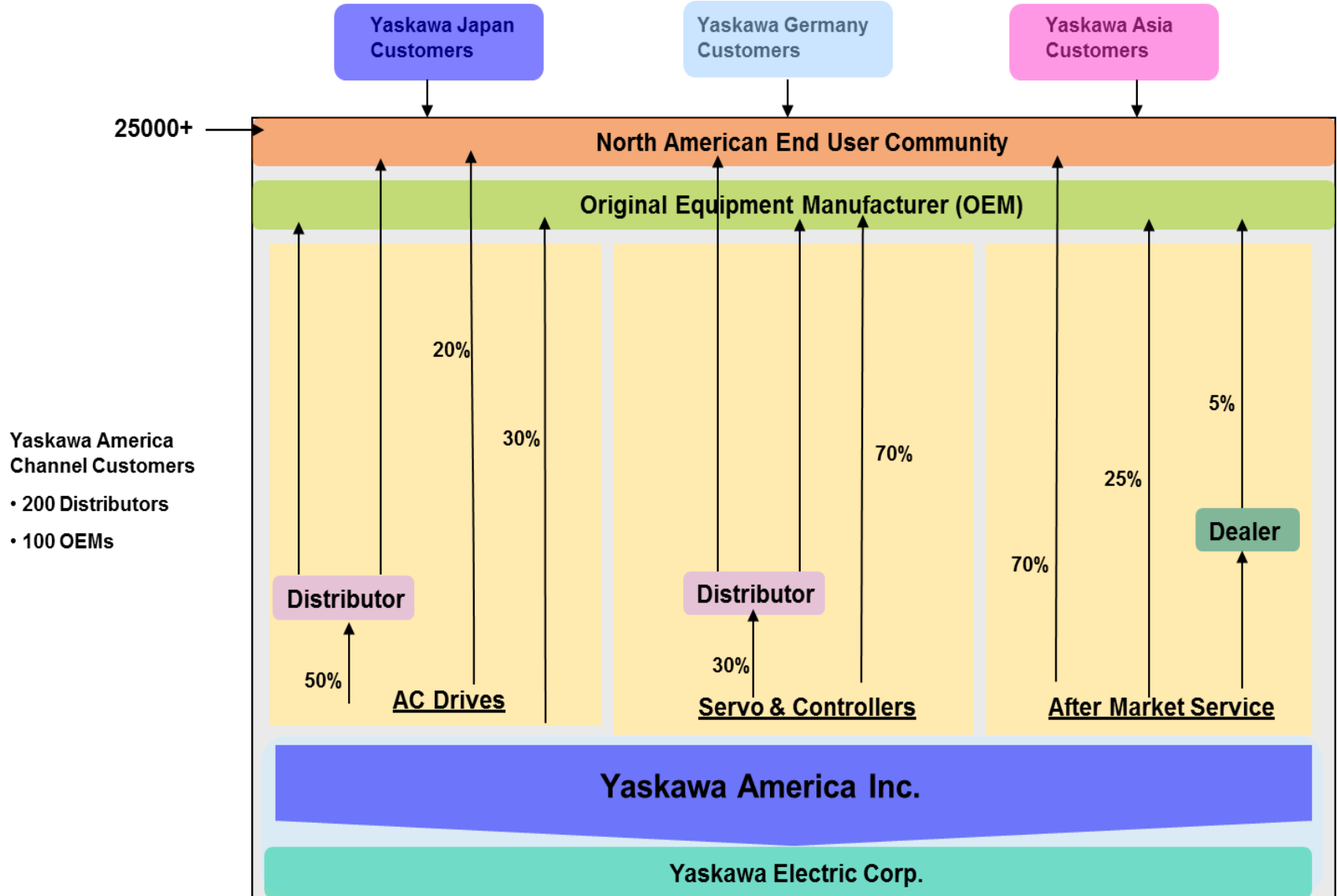
Drives



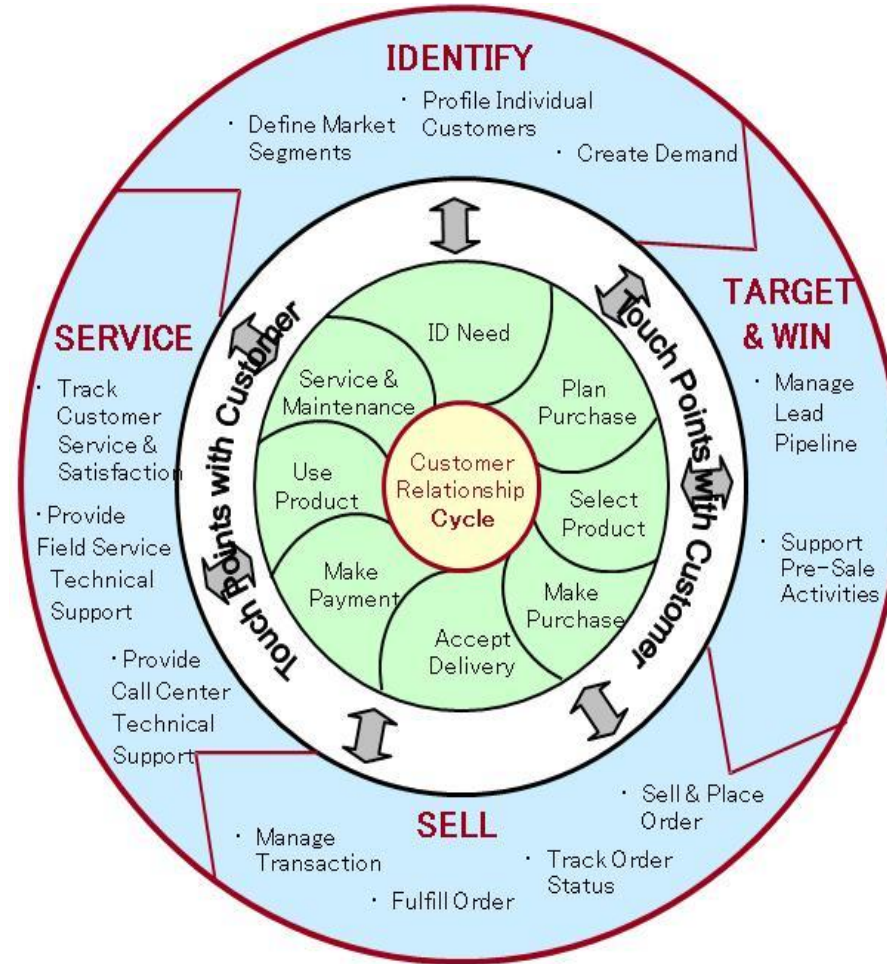
Motion Control



Yaskawa America Business Landscape



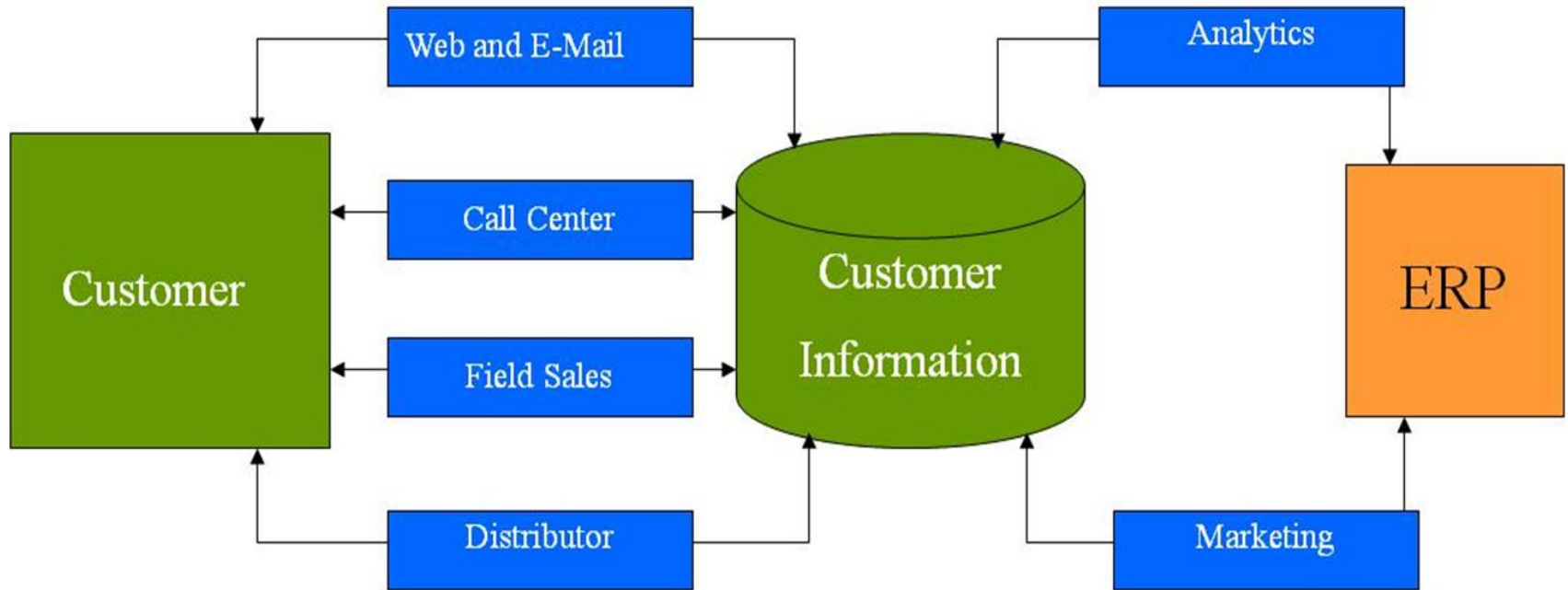
Identify Key Touch Points with Customer



Mapping out KPIs

| Metric | Description | Source | Goal | Customer Experience | Employee Productivity | Operations Management | Financial Effectiveness |
|--------------------------------|--|-------------------------------------|----------------------------------|---------------------|-----------------------|-----------------------|-------------------------|
| One Call Close | Interactions handled and resolved with first contact - not including calls that are transferred | Case Management | 80% | X | X | X | X |
| Repeat Report | Interactions that are reopened within 24 hours of being closed | Case Management | 5% | X | X | X | X |
| Average Case Resolution Time | Average total number of business hours from the moment the interaction is received to resolution | Case Management | determine by case type | X | X | X | |
| Abandonment Rate | Percentage of callers who hang up before the call is answered | ACD | <4% | X | | X | |
| Average Wait Time | Number of seconds to answer call. | CTI - by contact point | phone <25 Sec email/fax <4hrs | X | | X | |
| Customer Issues and Complaints | Root cause analysis to develop preventive measures | Case Management | <0.05% of case load | X | | X | |
| Customer Satisfaction | Surveys customers regarding satisfaction with Yaskawa's products and services | Annual Customer Satisfaction Survey | Year over year improvement | X | | X | |

Managing Big Data



2005 Yaskawa Embarked on our CRM Journey

Annual, Transactional and Phone Surveys

Confidential Yaskawa Use Only

YASKAWA
A World of Automation Solutions™

2000 Yaskawa Customer Satisfaction Survey Results
February 2001



Driving value

Customer Satisfaction Survey
2014



YASKAWA

PR-150-01 | Rev. 1.00 | Date: 11/16/2015 | © 2015 Yaskawa Electric America, Inc. All rights reserved. Confidential Yaskawa Use Only.

YASKAWA

In our continuous effort to provide our customers with the highest level of customer satisfaction, we appreciate you taking the time to rate the items below. Your feedback will help us allowing us to provide you with the best possible customer service.

Information

Choices

Did the Yaskawa America technical support engineer resolve your issue?
☐ Yes ☐ No

Was your issue resolved the first time you contacted Yaskawa America?
☐ Yes ☐ No

Did you attempt to solve your issue by visiting the support area of <http://www.yaskawa.com> before calling Yaskawa America's technical support staff?
Please choose

Other:
Please choose

Did you refer to the instructions included with the product prior to calling?
☐ Yes ☐ No ☐ I am the distributor

How satisfied are you with the time it took to resolve your problem?
☐ Not at all ☐ Slightly ☐ Moderately ☐ Very ☐ Completely

How would you rate your overall experience with Yaskawa America's technical support staff?
☐ Excellent ☐ Good ☐ Average ☐ Fair ☐ Poor

When contacting a company for support, which of the following methods do you prefer to use?
☐ Live Phone Contact ☐ E-Mail ☐ Live Chat

Date: 07/20/2012

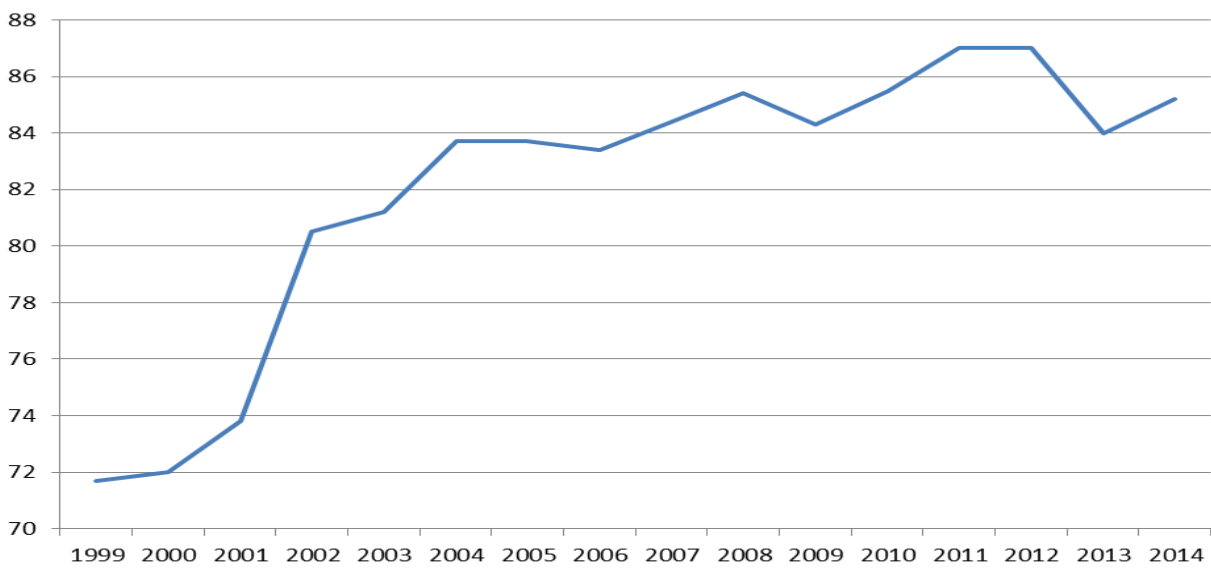
Incident#: 440213467

What can we do to improve our level of service?

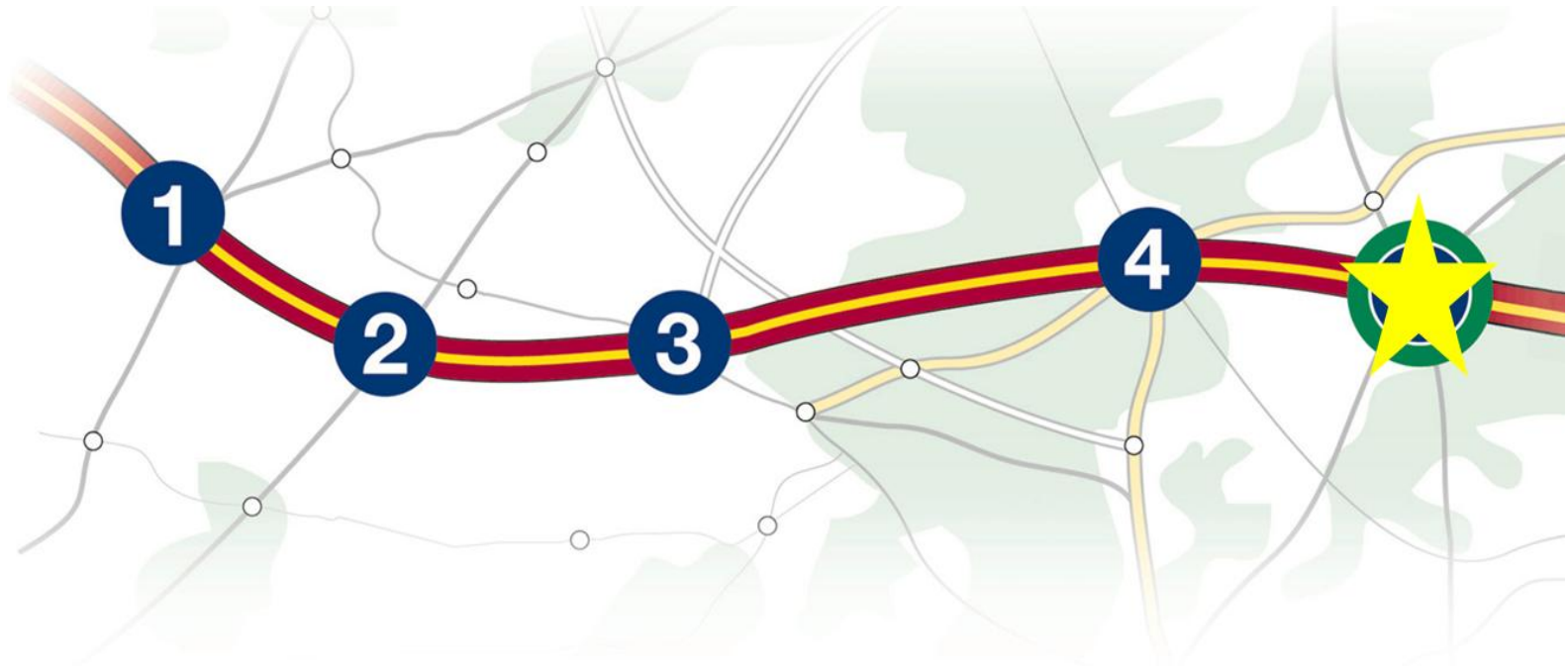
Survey Completed By:

Submit

Yaskawa Customer Satisfaction



Roadmap

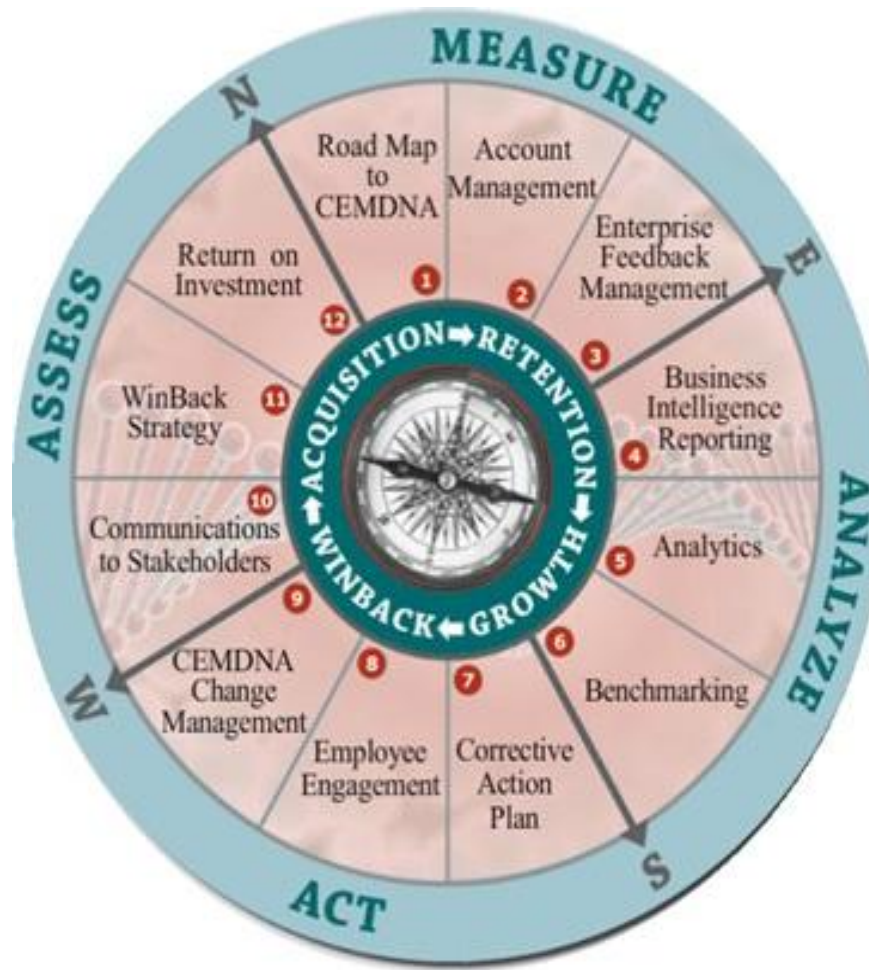


CEM is the identification and measurement of all the interactions a company has with its customers to ensure each company activity delivers value so customers continue to buy and recommend the company's products and services.

Are we on the right Path?

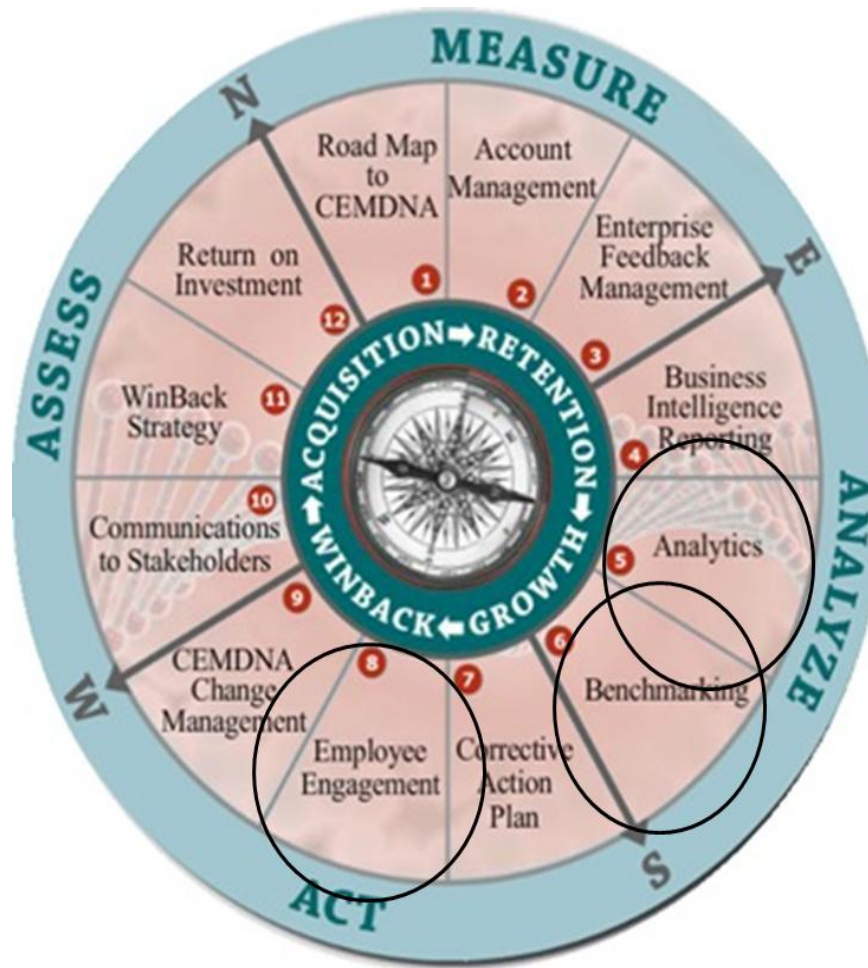
Just like a pilot needs a navigation system, we need a blueprint, a **CEM Playbook StrategySM** that will keep us on course, allow us to make mid-course corrections and achieve our vision of Customer Experience Management.

Validate our CEM Program



CEM - DNA Playbook StrategySM

Validate our CEM Program



CEM - DNA Playbook StrategySM

⑤ Analytics

- ☐ Gap Analysis
- ☐ Vulnerability Index
- ☐ Key driver analysis
- ☐ Text Mining
- ☐ Predictive
- ☐ Omega ScoreBoard Index
- ☐ Balance ScoreCard
- ☐ Net Promoter Score (NPS)
- ☐ Key Performance Indicators (KPI)
- ☐ Others

⑥ Benchmarking

- ☐ **Top 25 – Best in Class**
- ☐ **NorthFace ScoreBoard Recipients**
- ☐ **Industry**
- ☐ **Head-to-Head Competitors**
- ☐ **Multi-National Benchmark by Country**

⑧ Employee Recognition & Education

□ Employee Recognition & Compensation

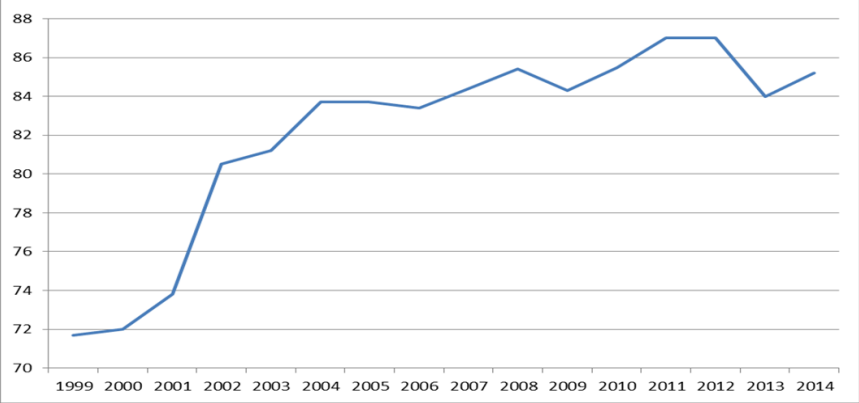
- *Set balance goals on KPI's and customer satisfaction*
- *Recognize/reward employees individually and/or by group*
- *Link compensation to customer satisfaction results*

□ Employee Training

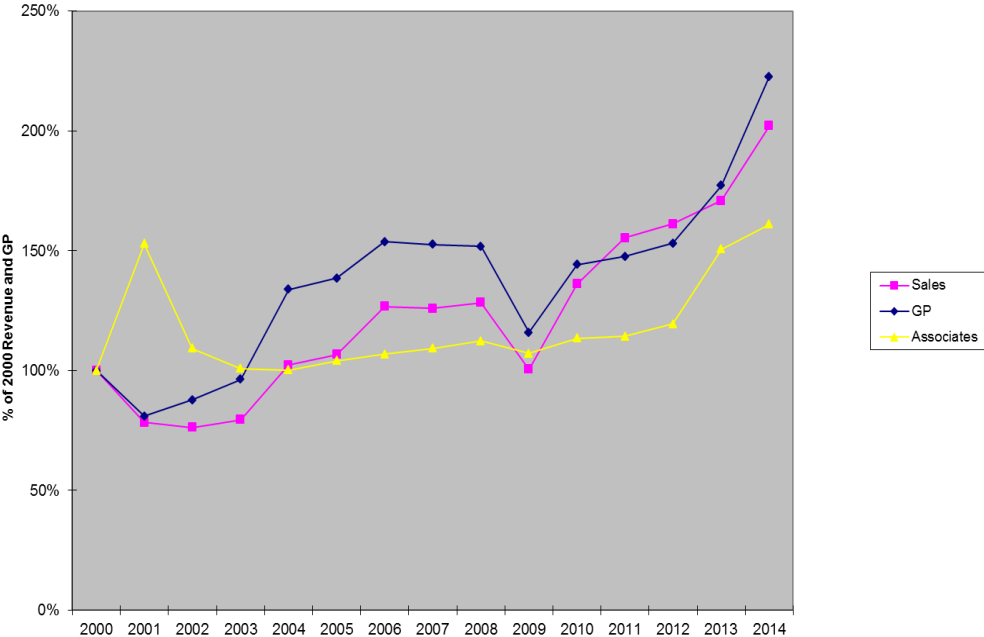
- *Continuous employee training – soft skills & technical competence*
- *Customer Relationship Management Certification Training*
- *Customer Experience Management Certification Training*

Constantly Monitor

Yaskawa Customer Satisfaction



Productivity Gains



Summary

- Analyze your CEM Strategy.
- Focus on areas of improvement which could yield the best ROI.
- Continually monitor your CEM Metrics.
- Continually monitor the CEM space for emerging trends.
- Engage in third parties to assist in your journey.

Move, Manage and Secure Collaboration Content

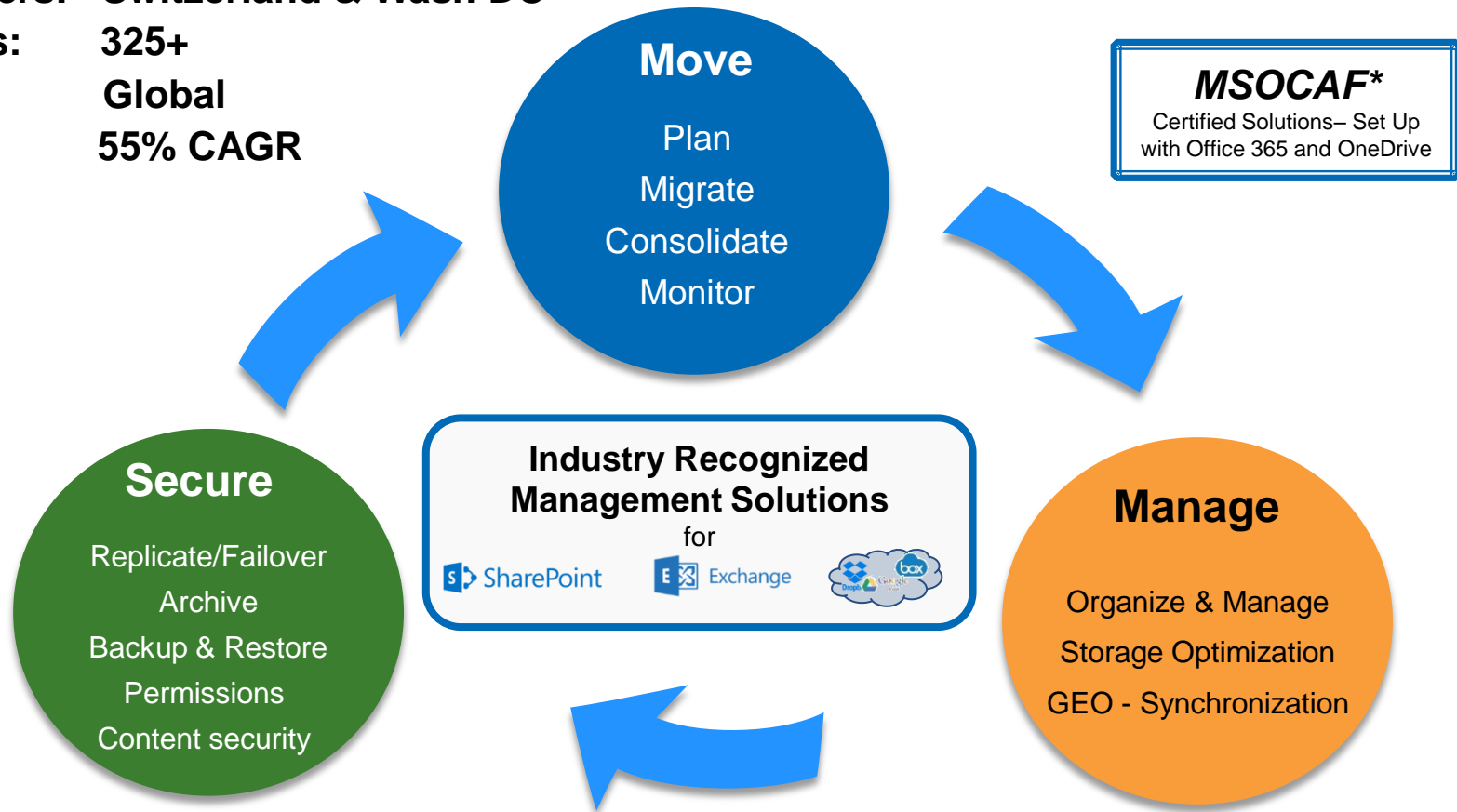


Tony Daubenmerkl
VP Global Client Support

Metalogix

Move, Manage, and Secure Content for SharePoint, Exchange, On-Premises, Office 365, Private & Hybrid Cloud

Founded: 2008
Headquarters: Switzerland & Wash DC
Employees: 325+
Teams: Global
Growth: 55% CAGR



*MSOCAF - Microsoft SharePoint Online Code Analysis Framework – required for deploying custom solutions on Office 365

August 2013 News

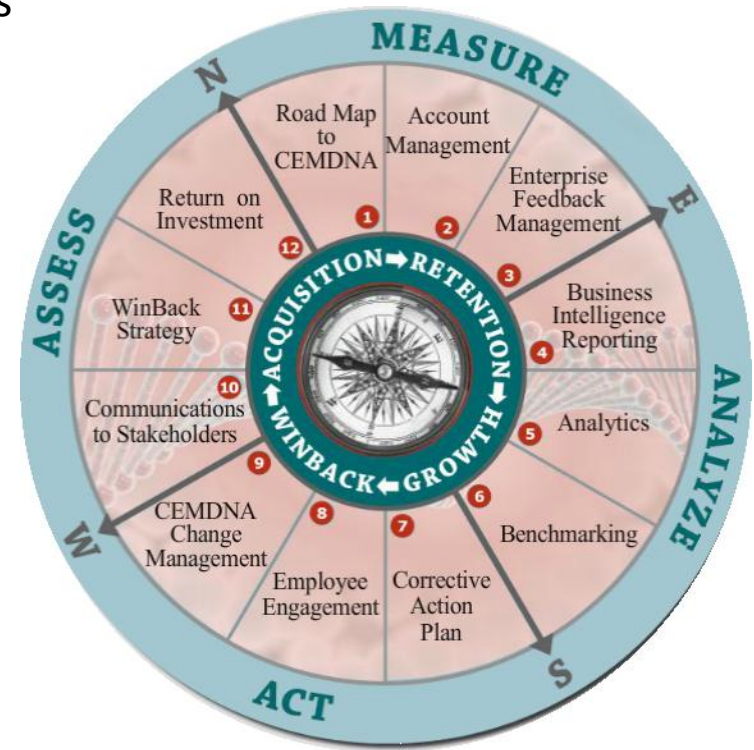
Metalogix + Axceler + idera

Metalogix has acquired Axceler and Idera's SharePoint businesses including market leading SharePoint administration and permissions management, backup and diagnostic monitoring technologies.

With the addition of these best of breed offerings Metalogix now offers the industry's most complete infrastructure management suite of products to deploy, operate and protect SharePoint. Metalogix offers the industry's only live person 24X7 technical support. For the first time, organizations have a single provider to leverage for all of their SharePoint infrastructure needs.

The Discovery

- **Doubled Customers**
 - From 7,000 licensed customers to 14,000 plus
- **Client Success**
 - Single contact “House on Fire” Approach
 - No focus on future sale or renewals
 - **Customer Experience not positive**
- **Support Team**
 - Heavy workload
 - Customer resolution challenges
 - Limited data in CRM system to address issues
 - Dedicated
 - Frustrated
 - Felt under staffed

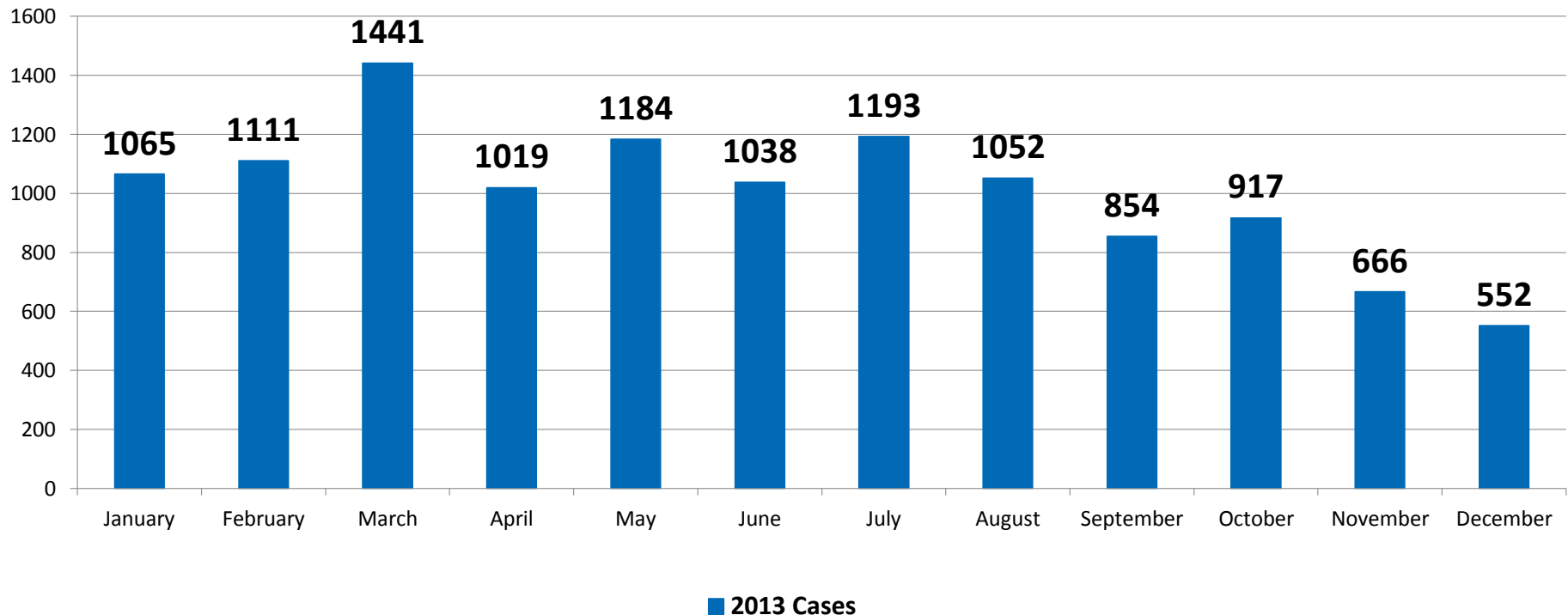


CEMDNA Strategy

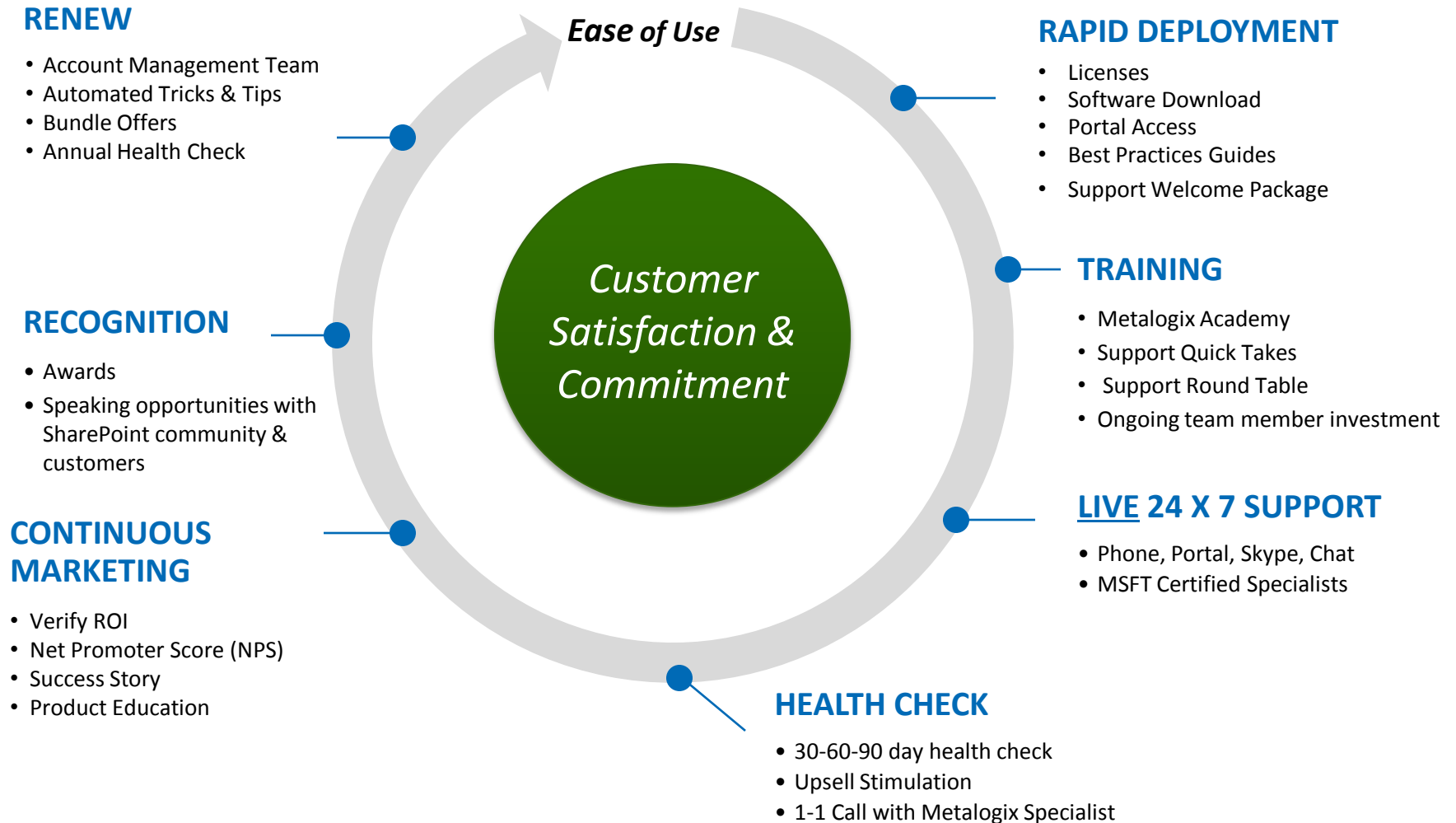
= Pending Failure

Strategy

- **Measured:** Understood their primary frustration – Customer & Staff
- **Analyzed:** Cases, licenses, customers, challenge areas
- **Acted:** Customer & Team focus – internal and external, communication
- **Assess:** ROI- Maintenance renewals, product sales, customer satisfaction



Metalogix Client Success Lifecycle



Outcome

1. Improved Customer Satisfaction

- Product support surveys

2. Increased Maintenance Renewals

- First quarter return
- Approximately 200 additional renewals

3. Increased Re-Occurring Sales

- First quarter return
- Increased the number of products per customer by 5%

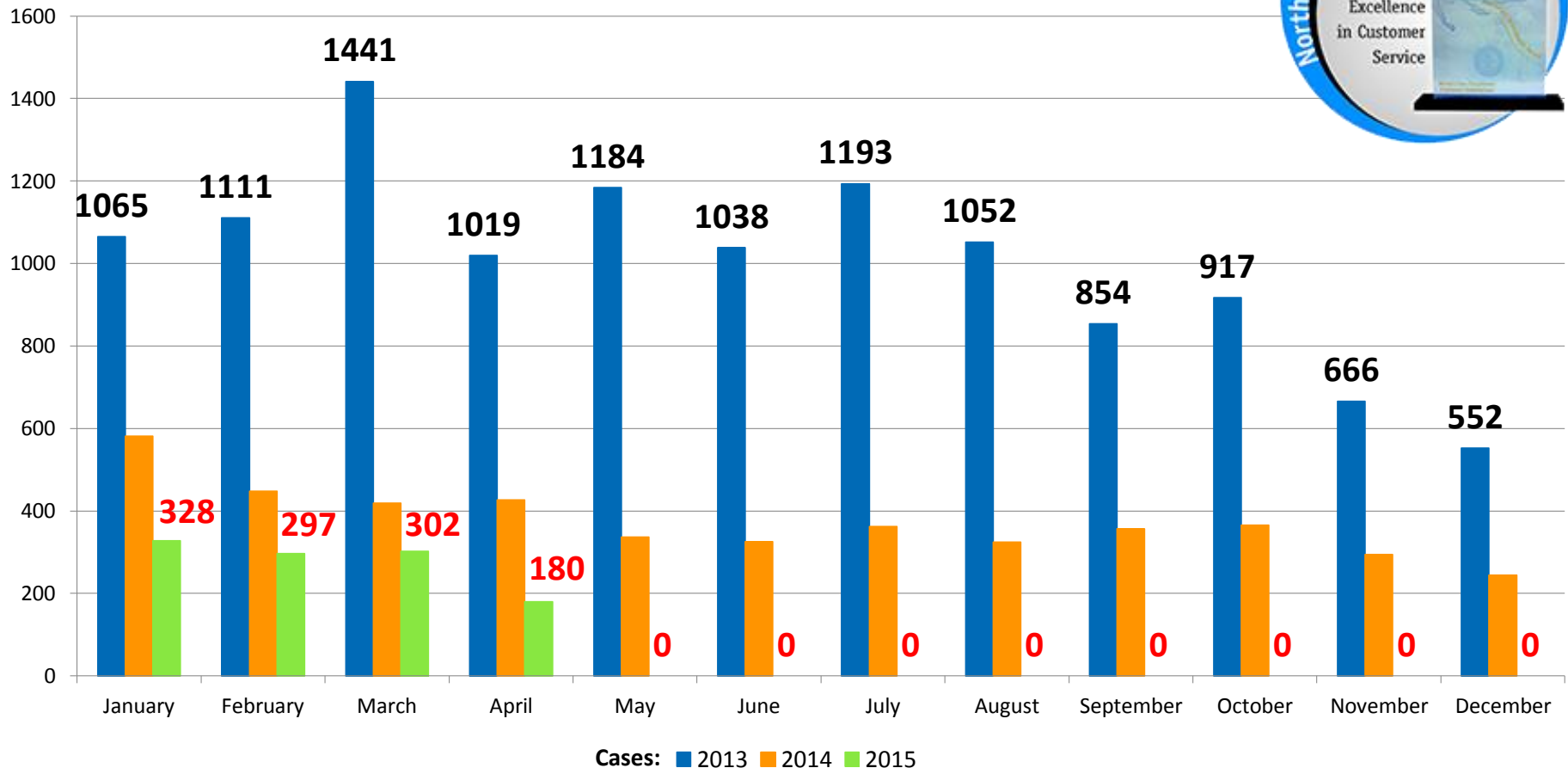


Embedding 'Client Success' into the process has:

1. Solidified the 'TEAM' commitment to our organization and our customers
2. Improved customer satisfaction continues to increase maintenance renewals
3. Increased products installed

Support Workload Redefined

- Positive customer feedback – Win back and ROI
- Acquiring the NorthFace Award



Summary

Ensure Customer Commitment from Day 1:

1. MEASURE and ANALYZE

- You Don't Know What You Don't Know

2. ACT: TEAM

- Involvement from Day one
- Listen, Plan and Act

3. ACT: Customer

- Outreach
- Recovery

4. ASSESS: ROI

- Future Sales
- Renewals

Thanks for Your Participation



Fernando Bonaventura
Global SPARC Technology Service
Center
Tel.: 781/442-1084
fernando.bonaventura@oracle.com

ORACLE®



Dennis Fitzgerald
VP Customer Satisfaction
Tel.: 847/887-7000
dennis_fitzgerald@yaskawa.com

YASKAWA



Anthony Daubenmerkl
VP Global Client Support
Tel.: 202/688-3607
tdaubenmerkl@metalogix.com

Metalogix

Requests for Information

Bill Bradley
VP, Marketing & Business Development
Omega Management Group Corp.
bbradley@omegascoreboard.com
Tel. 978/715-2587



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