

## A CUSTOMER EXPERIENCE ROADMAP

A business discovers where and how to improve the quality of its customer experience.

The executives of a Fortune 1000 company sensed the firm could do a much better job serving its customers. But they weren't quite sure where and how to start. That's when they called Watermark to conduct an in-depth Customer Experience Assessment, bringing refreshing clarity to their future direction.

### About the Profiled Company

The firm is a \$1.6 billion property and casualty insurer serving both residential and commercial clients.

### The Challenge

Given the many different businesses and clients served by this company, not to mention the complex and highly regulated nature of its operations, figuring out the best way to improve its customer experience was a daunting task. There were many opinions, but rarely a consensus. The organization was prepared to invest in this effort, but needed an objective view on where the current customer experience was strong, where it was weak, and what could be done to generate significant improvements, short-term and long-term.

### The Solution

Watermark's proprietary "Customer Experience Reality Check" process was used to bring clarity to the company's customer experience improvement strategy. First, key customer touchpoints were mapped, revealing important interactions on which the company hadn't previously focused. Second, the quality of the touchpoints – in terms of reinforcing the company's brand and cultivating customer loyalty – was assessed via mystery shopping, client interviews, employee shadowing and other techniques. Finally, all of the information compiled was used to define a prioritized list of actions that would enable the firm to achieve small, credibility-building wins while also investing in longer-term improvements.

Among the services provided by Watermark were:

- **Touchpoint mapping** to inventory and assess the current customer experience.
- **Mystery shopping/servicing** to secure an unfiltered perspective on the experience.
- **Experience engineering** to define a future-state for loyalty-enhancing interactions.
- **Simplification** to make it more effortless for customers to interact with the company.
- **Operations improvement** to develop detailed recommendations for process redesign.
- **Brand development** to identify aspects of the company's value proposition to accentuate.

### The Results

The Customer Experience Reality Check yielded over 200 detailed recommendations for improving the firm's customer experience, approximately 40% of which were implemented within eighteen months of the assessment. Benefits of the exercise included:

- **Clarity of direction.** The executive team and larger organization were now able to rally around a manageable set of short-term actions, as well as a longer-term playbook.
- **Actionable tactics.** The assessment provided very specific guidance on potential improvements, enabling the firm to pursue many of them without outside assistance.
- **Quick wins.** By triggering some quick, low-cost improvements, the project built credibility for the firm's customer experience strategy, in the eyes of clients and employees alike.

### Watermark Consulting

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