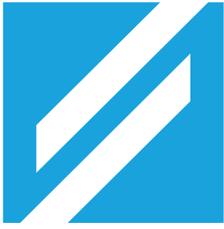# Mini case study

Large convenience and gas retailer

How a leading convenience and gas retailer drives company-wide action on customer experience data and measures ROI

INTOUCH INSIGHT

CHALLENGE

As a retailer committed to continuously improving customer experience (CX) across their locations, the company needed a better way to collect and analyze customer feedback to identify the key drivers of customer satisfaction and which areas of the customer journey needed to be improved.

Since the company has so many locations, they like to use pilot programs to test if new standards and CX initiatives have the desired result on business metrics before rolling out the program company-wide.

The company needed a solution that would help them measure whether or not the pilot programs they created to drive improvements were successful.

SOLUTION

Using Intouch Insight's customer experience management software, LiaCX™, the retailer collects feedback through customer satisfaction (CSAT) surveys. The retailer also uses IntouchShop® mystery shopping to measure frontline staff compliance with brand standards.

All data is displayed on dashboards in real-time and artificial intelligence-powered features transform the feedback to identify trends. Data is mapped to the customer journey and displayed on journey map dashboards to help the retailer easily identify which touchpoints need to be improved. Advanced filters allow the retailer to view performance by district and location.

One of the questions on the retailer's survey is whether or not the customer felt their business was appreciated. Using Intouch's key-driver analysis, the retailer was able to learn that the interaction between the customer and the employee is the touchpoint that has the biggest impact on overall customer satisfaction. Journey map dashboards identified that customers who paid inside the store, had lower scores for "I felt my business was appreciated" and had lower overall satisfaction, than those that paid at the pump.

To make more customers feel that their business was appreciated and improve overall CSAT scores, the retailer created an action plan focused on improving the in-store experience. The main interaction that customers and employees have inside the store is when the customer is paying. In fact, one of the retailer's standards is for employees to thank the customer for their business during the parting remark.

Since the retailer's data from other CX programs such as mystery shopping is unified in the LiaCX platform, it was simple for the retailer to cross-reference their mystery shopping scores to check if employees where adhering to the standard of thanking the customer during the parting remark. They learned that this was an area they needed to focus their efforts on.

Action Campaign™

By collecting and interpreting customer experience data, the retailer identified what they needed to do to drive improvements. Now it was time to take action. While many organizations struggle with this CX competency, this process-oriented retailer has best-in-class processes for driving action.

First, they identified which locations would be included in the pilot program and how long the program would be. Then they decided what actions needed to be taken to make more customers feel their business was appreciated and improve overall CSAT. For this Action Campaign, staff training was the focus.

To roll out the pilot program, the retailer followed their standard Action Campaign processes:

1. Set campaign timeline: The retailer sets a timeline for the campaign based on the complexity of the program. This is based on how long they anticipate it will take for employees to become familiar with the new standards, and gives them enough time to develop best practices within the pilot network before rolling it out across every location.

2. Set a goal: The retailer defines a metric or KPI they want to improve (in this case making the customer feel appreciated and overall CSAT) and sets a goal on what score they want to achieve.

3. Communicate the plan: The retailer has specific roles within the organization that communicate the pilot program is coming, when it is coming, and what is going to be required of the stores and associates.

4. Campaign checklists: The retailer provides detailed step by step instructions that define what needs to be done and assigns those tasks to different employees, so everyone is aware of what they are responsible for.

5. Set dates for training: When Action Campaigns require demoing or training (this campaign required training) they schedule those dates with the teams. In some cases, they use web-based training programs where employees must achieve certain scores. When it's needed, the retailer does workshops to check-in on employee learning.

6. Verify completion and training progress: Employees must check off that they have completed the training, demo, workshop or online training which can be easily tracked and validated within the LiaCX platform.

7. Measure program impact: Using mystery shopping the retailer performs on-site evaluations to verify whether retail associates are complying with the new processes and standards defined in pilot programs. In this case, it was measuring if employees were thanking the customer during the parting remark. Since retail associates do not know they are being evaluated by the secret shopper, the retailer is able to gain accurate, unbiased data.
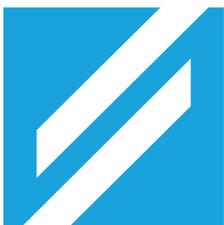
All of these processes can be completed within the LiaCX platform using patent-pending Action Campaign technology. Action Campaign technology also allows the retailer to verify what tasks are being completed and see the impact actions are having on business metrics in real-time. This helps them keep a constant pulse on the success of pilot programs and CX initiatives.

LiaCX Action Campaigns also allow the retailer to easily compare the scores of locations participating in the pilot program to those that are not. This empowers them to make faster, more informed decisions about whether or not they want to roll out campaigns across all of their locations.

RESULTS
The retailer was able to achieve a 10% increase in customers who felt they were valued within just three months.

Overall, LiaCX has helped the retailer solve their key organizational challenges: identifying the key drivers of customer satisfaction and which areas of the customer journey needed to be improved and finding a better way to measure the impact of their CX initiatives.