

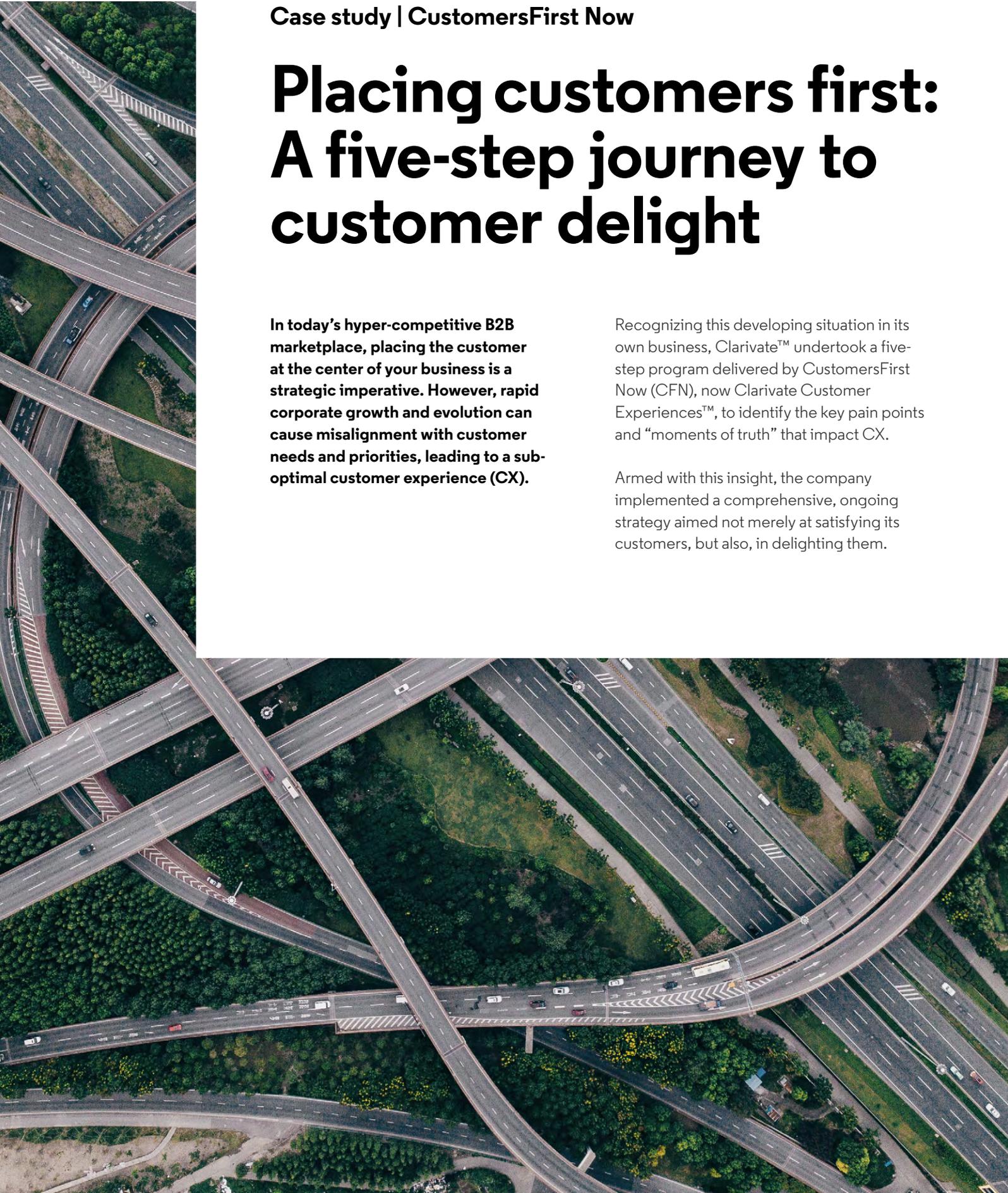
Case study | CustomersFirst Now

# Placing customers first: A five-step journey to customer delight

**In today's hyper-competitive B2B marketplace, placing the customer at the center of your business is a strategic imperative. However, rapid corporate growth and evolution can cause misalignment with customer needs and priorities, leading to a sub-optimal customer experience (CX).**

Recognizing this developing situation in its own business, Clarivate™ undertook a five-step program delivered by CustomersFirst Now (CFN), now Clarivate Customer Experiences™, to identify the key pain points and “moments of truth” that impact CX.

Armed with this insight, the company implemented a comprehensive, ongoing strategy aimed not merely at satisfying its customers, but also, in delighting them.





## **The challenge: Growth disrupts customer experience**

Over the past decade, Clarivate, a global leader in providing trusted information and insights to accelerate the pace of innovation, has dramatically reshaped its product and service strategy as a result of strategic acquisitions and investments. By 2019, as the business grew and became truly global, the company needed to better align with market dynamics in order to meet customer demands for improved, faster access to actionable information and insights.

The rapid pace of the company's business evolution challenged its ability to scale key business processes. This, in turn, disrupted its customers' day-to-day experiences. Customers were faced with multiple points of contact and inconsistent messaging that made doing business with the company harder than it should be.

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## **The solution: Five-step customers first program**

The Clarivate leadership team worked with the CX team to develop and implement a customers-first program that could evolve over time, focused on "customer delight."

In collaboration with the Clarivate leadership team, the CX team pursued a five-step process:

- 1. Define**
- 2. Listen**
- 3. Act**
- 4. Communicate**
- 5. Reward**



## Define

The first step to creating a customer-centric culture is identifying who the customer is. In this case, the customer is “anyone we serve” both inside and outside the company. For a B2B company it is important to recognize that everyone has a customer.

Creating a customer-focused culture starts with everyone treating each other as a customer. Key behaviors include:

1. Be responsive
2. Listen and understand needs of each other
3. Act with a sense of urgency to solve issues and deliver results

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## Listen

Now let's focus on the external customer as we discuss the second key step. Gaining a clear sense of customers' perceptions of doing business with Clarivate was critical. To achieve this, the CX team created an “outside-in” and “inside-out” customer experience journey map. This is a visualization of the end-to-end customer experience with Clarivate, including the outcomes of interactions at each step in the journey.

The team conducted more than 30 qualitative interviews with customers to gain the “outside” perception, plus interviews with customer-facing Clarivate colleagues to gain the “inside” perception. They also included over 10,000 survey comments in their final analysis. Analyzing where these perceptions align and where there are gaps provides important insights.

This analysis enabled the CX team to identify customer pain points and “moments of truth.” Pain points are interactions that are frustrating, stressful or require more effort from the customer. Moments of truth are interactions that can determine whether a customer stays or leaves—“make or break” issues which demand immediate attention.

This “listen” phase revealed that customers found it difficult to do business with Clarivate. Too many points of contact and complex and inconsistent processes created customer frustration.



## Act

Sharing the results of the customer journey map and customer perceptions helped to secure commitment from the Clarivate CEO and executive leadership team to commit to a series of actions aimed at delighting customers. Informed by the “moments of truth” revealed in the previous phase, the team focused on improving and simplifying its processes and product offerings, setting specific goals to make it easier to do business at Clarivate. These were centered on three key areas:

### 1. Customer Effort

To make it easier to do business with Clarivate, the company focused on:

- Enhancing and accelerating customer issue resolution with the goal of improving customer effort score (CES) from 1.8 to 1.5 (CES measures how much effort a customer must exert to fulfill a request)

- Reducing the number of approvals in the quote-to-contract process
- Streamlining contact numbers and shortening customer care wait times

### 2. Solution Quality

To increase the value delivered to its customers, the company:

- Improved the quality of its data to ensure accuracy and reliability
- Bolstered the timeliness of information, enabling decisions based on up-to-date data
- Simplified the product offering and improve product usability

### 3. Guided Experience

Proactively guiding customers to solutions that address their needs was a key factor in improving the customer journey. To achieve this, Clarivate:

- Enhanced the new customer onboarding experience to help them better understand the full range of offerings and enhance the perception of Clarivate as a trusted partner focused on their needs
- Boosted customer webinar attendance with more active development and promotion of useful webinar content, delivered by Clarivate thought



## Communicate

Maintaining communication with customers is crucial to building strong relationships. Clarivate created customer-focused messages for external and internal customers to demonstrate that the company is listening and acting on customers’ feedback.

The company instituted a twice-yearly Customer Delight survey, correlated

to customers’ buying behaviors, and conducted ongoing one-on-one interviews with key customers. Internally, a Colleague Engagement survey is in place to gauge how well colleagues are feeling about their own experience at Clarivate.

To keep colleagues informed on progress, a dashboard was launched on the Clarivate intranet, providing monthly “Customer Delight Scorecard” reporting. The scorecard charts progress on top 10 metrics with the highest impact for delivering visible improvements in the three key areas of focus: Customer Effort, Solution Quality, and Guided Experience.

## Customer delight scorecard

		2021 goals			May	Oct	Status
<b>Delight (relationship survey)</b>		-	-	-	-	-	
Customer delight driver	Metric	Exec sponsor	Champion	Goal	Baseline	Nov '21	Status
Customer effort	Invoice dispute resolution (reduce # of credit rebills monthly)	-	-	-	-	-	↑
	Customer issue resolution (Improve CES from 1.8 to 1.5) (improve FCR from 68% to 70%)	-	-	-	-	-	↑
	Reduce # of approval in quote to contract process (50% reduction by end of May and 75% by end of December)	-	-	-	-	-	flat
Solution quality	Improve data quality (10% reduction in WOS data errors)	-	-	-	-	-	↑
	Improve information timelines (20% decrease in # days from 28 to 22)	-	-	-	-	-	↓
	Usability of products (Ease of doing business from 79 to 90)	-	-	-	-	-	↑
Guided experience	Onboarding experience (easy to do business from 77 to 80)	-	-	-	-	-	flat
	Increase customer webinar attendance (from 30% to 45% average)	-	-	-	-	-	↑

↑ Month over month improvement

↓ Month over month decline

■ Achieving goal

■ In progress or not meeting goal

Messaging was reinforced across the company through internal town halls, newsletters, and other channels to make Customer Delight part of the Clarivate DNA.



## Reward

The success of any customers-first initiative depends on active and enthusiastic participation from every colleague in every customer interaction. Rewarding colleagues who demonstrate that commitment is a key part of the Clarivate program.

To incentivize and reward progress toward Clarivate Customer Delight goals, the company introduced a Customer Delight Equity Award program. This rewards 100% of colleagues based on achieving specific Customer Delight goals.

Clarivate also names two to three winners a year on exceptional Customer Delight performances and these winners are included in an annual award trip.

Lastly, Customer Delight is a daily way that Clarivate recognizes its colleagues going above and beyond for their internal or external customers as part of its recognition platform. Colleagues can nominate each other, which makes this dynamic and fun.



## Results: Measurable improvements in Customer Delight

Measuring your progress is a key aspect of a comprehensive CX initiative. Following implementation of the program, Clarivate observed many encouraging results, showing significant progress against company goals. Results included:

- Increased Clarivate year-over-year Customer Delight score by 2 points in 2021
- Progressed toward goals across key operational measures on the Customer Delight Scorecard, including data quality, data timeliness, and product usability
- Actively integrated new acquisitions with a customers-first mindset
- Expanded “listening posts” based on identified pain points, including customer onboarding when customers are using our products and when customer leave us

**Customers-first is not a “one and done” proposition; it requires a commitment to continuous improvement informed by ongoing communication with customers. Clarivate is continuing to monitor its progress and identify potential new areas of opportunity for delighting customers.**

## More than a partnership

A positive customer experience is absolutely essential for attracting and retaining customers in today’s competitive B2B marketplace. With expertise and support from the CX team, Clarivate was able to illuminate pain points and moments of truth that drive customer perceptions and purchasing decisions. This provided a clear roadmap, guiding concrete actions that improved CX in meaningful ways, while forging an approach centered on Customer Delight.

The successful outcome of this engagement, bolstered by the professionalism of the CX team, inspired Clarivate to acquire the company. Now all Clarivate customers can benefit from this proven process for creating a world-class customer experience.

For assistance with building a customers-first program, contact our CX consultants.

Contact our experts today:

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