

# ➤ Make Your Business Stronger with Smarter Customer Insights



# Smarter Customer Insights

## Give Businesses The Competitive Edge

It's a highly competitive landscape out there for any business today, because the challenge not only lies in winning new customers, **but keeping them too.**

It's true, businesses must work harder and smarter than ever to earn loyal customers who won't stray to the competition. Most businesses understand delivering an outstanding customer experience is crucial to repeat custom and referrals, and for that, customer insights are essential. Unfortunately, efforts to obtain insights are often futile because **many survey methods lack the dynamic capabilities to meet the individual needs of a business**, delve deeper into issues and report fast enough to take meaningful actions that really make a difference.

**This white paper introduces Survey Dynamix, a modern, fully integrated cloud-based solution that tackles these common weaknesses head-on to ensure your business is equipped to get inside your customers' minds and act fast.**



# Why every business needs better customer insights

Never before have customers had access to so much choice. Thanks to the online world, they are no longer limited to high-street retailers and services who once monopolised local markets. It's different now – your business' competitors are national, and sometimes, international. This has huge implications for the modern business operator because not only is it easier for new competitors to enter the fold, but **customers who don't enjoy their experiences will move on, simply because they can. And they won't volunteer to tell you why.**

**Knowing exactly what your customers are experiencing, thinking, and saying about your business is critical for success.** These insights can be used to craft a stellar customer experience that will give your business the all-important edge over competitors. Here are some of the key benefits reliable and accurate customer insights will bring:

## > Helping to enhance your core product or service

**By asking the right questions, customer insights can be used to inform your product development process to ensure the business continues to meet the needs of its market.** Like a set of eyes and ears amongst customers, insights can also keep organisations ahead of the curve when it comes to the timely delivery of brand new products, enhancements, or new services.

## > Enabling exceptional customer experiences

Feedback can be turned into real actions by influencing **how a business goes about delivering the high standard of service and customer relationship management required to maximise customer loyalty.** For example, detailed and reliable insights can be used to design changes to internal and external processes as well as enhance training programs.

## > Damage control

Sometimes mistakes are made but there's always opportunity to convert a customer's negative experience into a positive one – provided you act fast. **A sophisticated customer survey system that flags issues in real-time enables relationship managers to immediately target the customer in question, resolve their complaints and exceed their expectations.**

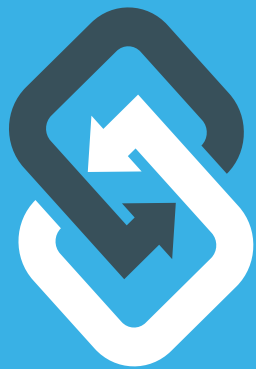
## > Better strategic decisions

**Gathering valuable feedback from your customer base at every appropriate opportunity can, over time, enable businesses to gain a superior understanding of who their customers are and identify trends and patterns of behaviour that drive better strategic business decisions.** For example, insights can show when products and services are declining in popularity, while others might be increasing. Here, you have an opportunity to investigate and react in the best interests of the business.

# Customer insights: The challenges

Getting inside the minds of customers isn't easy. Indeed – customer surveys are the most cost-effective and attainable method for facilitating feedback but **the average customer survey tool brings several drawbacks**. These drawbacks prevent an organisation from efficiently obtaining the type of meaningful insights required to realise any of the benefits above. These include:

- **The “one-size-fits-all” medium.** Your method of communication when delivering a customer survey will be crucial to its success. Whether the survey is to be delivered via email, SMS or telephone, different types of customers will harbour their own barriers to each; and this often has a lot to do with demographic. For example, generation X customers might be far less likely to respond to email surveys while more digitally connected, time-poor millennials might appreciate the flexibility email surveys offer. **Most survey solutions don't offer the capability to alternate and test your survey mediums which is essential for maximising the return on your efforts.**
- **Inability to turn responses into actionable insights.** To make a real difference to any business, insights must be actionable and for that, you need to know the “why”. Surveys that follow a rigid line of questioning **may raise a business' awareness of poor experiences but offer nothing to help them improve.**
- **Lack of integration with existing business systems.** A business or organisation may have several customer touchpoints through existing software which may provide online forms, facilitate online purchases or log interactions with sales and customer service staff. **Survey solutions that don't integrate with existing software lack the automation required for an immediate and seamless transition between interaction, survey, response and action.** What's more, without an integrated survey solution it will not be possible to attach customer and agent data to surveys. This data can include anything the business already knows about the responding customer (such as interaction history, age, products purchased, and many more) and comes together to provide the context required for richer insights.
- **Lack of real-time reporting.** Without access to real-time data, managers and business owners won't have transparency over issues as they arise. Real-time reporting not only allows customer service managers to act immediately on individual complaints, but also provides the opportunity to **identify training issues so managers can step in and address the situation promptly.**



# Survey Dynamix

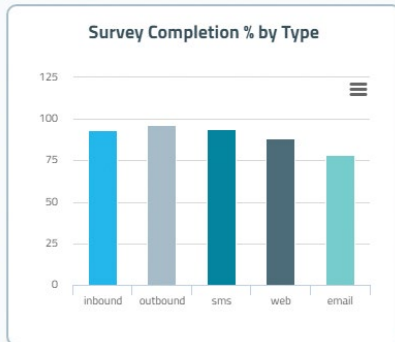
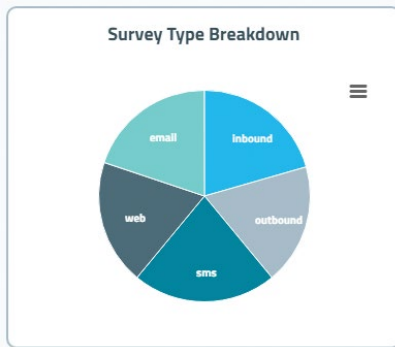
## A fully integrated cloud-based solution

Survey Dynamix is a cloud-based, post-call survey solution developed by a team of specialists with over 30 years' combined experience within the customer contact centre environment. The team understand that many existing solutions fail to provide users with accurate and reliable insights because they are not user-friendly and are difficult to customise to the individual needs of a business.

The Survey Dynamix solution tackles these challenges head-on by providing an intuitive web-based interface that allows users to create and automatically conduct highly flexible surveys. Through a number of unique capabilities, Survey Dynamix enables businesses and organisations to collect real-time, actionable insights from customers, anywhere and at any time.

# Here's how.

# Choice of survey medium



By offering voice, SMS, email and web-based surveys, Survey Dynamix allows users to choose the medium most suited to their customers and product. For example, while younger generations might be more receptive to SMS and email surveys through smart devices, older generations may prefer to stay on the call to answer questions or receive a call back at a scheduled time.

But it's not all about generational differences. **For customers making low-value transactions, their willingness to respond could be driven by speed and convenience alone.** For some products or services, delving into an email might seem like a disproportionate effort compared to one or two questions received via SMS. **The ability to experiment with your survey medium offered by Survey Dynamix will ensure you receive the maximum response rate from all your surveys.**

## Customisable surveys with responsive questioning

Surveys are designed using an intuitive survey creation interface. **This interface enables users to choose from a variety of different question types such as numeric scoring, voice recordings, free text SMS responses, Yes/No and Net Promoter Score.**

Users can also configure their surveys to alter the flow of questions based upon the responses provided by the respondent. **For example, if a respondent returns a score of less than 3, either on average or for an individual question, this could trigger additional survey questions which delve further into the customer's reasons by asking for a text or voice response.** Furthermore, surveys can be configured to ask different or additional questions depending on factors such as customer type, enquiry type, customer value and many more.

**By customising surveys in this way, users can collect and later analyse different forms of data by customer type, department, or against interactions with specific customer service agents** (see further details around integration and reporting in the next section).

Order	Label	Question text	Sound file	Type	Max response	Reporting	Options
1	Helpfulness	How helpful was the agent that handled your enquiry?	Question - Helpfi	Number	5	On	
2	Resolution	How completely was your enquiry resolved?	Question - Resol	Number	5	On	



# Integration brings automation and richer reporting

Through native integration using our API or via the Zapier API ecosystem, Survey Dynamix can be easily integrated with existing in-house systems such as CRM software, telephony systems or online platforms. This enables businesses and organisations to automatically survey customers following an interaction or when certain conditions are met. **For example, when a customer service agent closes a ticket in Freshdesk or Salesforce, this can automatically trigger Survey Dynamix to deliver the survey to the customer at the scheduled time.** Similarly, once a customer completes a transaction online, a survey can be automatically scheduled for a specific time and date after the delivery of the product or service.

With Survey Dynamix's fully integrated survey software, customer metadata can be transferred from any web-enabled, third-party system to Survey Dynamix and vice-versa. Attaching customer metadata to individual surveys vastly enriches the reporting of survey results. **With this capability, business owners and managers can access survey results by department, customer type, and specific agents.** This enables managers to identify and address underperforming staff members, unsatisfactory products or services and even departmental training issues. **Managers can also respond quickly to complaints by immediately accessing the relevant customer record and making prompt contact.**

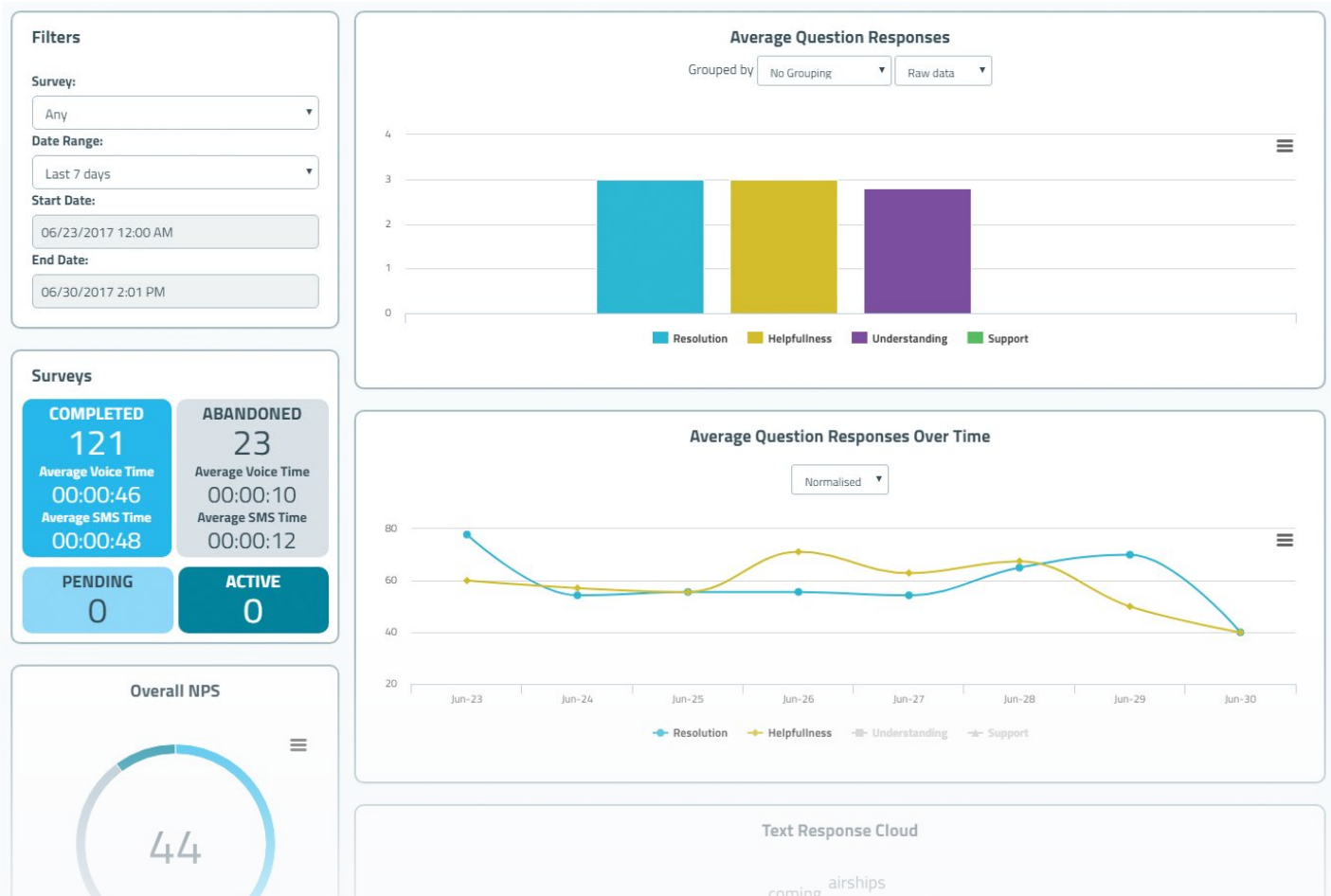
The two-way communication stream between Survey Dynamix and third-party systems also allows **survey data to be passed back to other software.** For example, survey results could be fed into a Google sheet for special attention, or important responses could notify a channel in Slack. What's more, past survey results can be used to inform customer handling processes and call routing to ensure customers are met with the appropriate resources when making future enquiries.

## INTEGRATION



# Real-time reporting

The real-time dashboard provides all the information required to keep track of responses at any given time. Survey Dynamix is a cloud-based solution which means **real-time reports can be immediately accessed from anywhere via any device.**



Upon login, the dashboard's intuitive design provides a snapshot of important statistics including surveys completed, abandoned, pending, average survey response time and completion rate by medium.

The data presented by the dashboard also provides deeper insights such as how much time customers are spending on surveys, or if they don't complete the survey, how long it takes them to abandon it. **Equipped with these insights, businesses can see which survey medium is achieving the best completion rates and is therefore more valuable for obtaining feedback.**



For more detailed insights, survey results can be aggregated against custom and core attributes such as agent, customer segment, product, service, customer type and interaction type. For example, you may wish to compare average responses between agents, or the NPS results between your bronze and platinum customers.

These capabilities enable businesses and organisations to understand how individual staff members are performing, how different areas of the business are performing and the perception of your business by different customer types at any given moment in time.

But while managers may want a more holistic view, aggregating results against custom attributes also enables other users to filter results that are only relevant to them.

Agent Scores		
Rank	Agent ID	Average Question Response
1/3	Agent Brown (abrown)	63.5%
2/3	Agent Jones (ajones)	61.7%
3/3	Agent Smith (asmith)	59.7%
Overall Average Question Response:		61.6%

Survey responses can also be viewed by date range which has the added benefit of enabling users to identify unfolding trends. In practice, this means managers can address deteriorating service levels and product or service popularity. Historical reporting can also help managers keep track of improvements following additional training measures, the introduction of new policies or product or service enhancements.

For a more proactive and agile approach to delivering exceptional customer experiences, the Survey Dynamix real-time dashboard enables users to quickly identify negative and positive feedback by listing the best and worst interactions so they can take immediate action. Furthermore, a unique notifications function can be configured to automatically populate an outbound campaign list that, in turn, triggers action by customer service agents who are armed with all the necessary information to respond quickly and appropriately.

Top 10 Best Interactions					
Agent ID	Completed	Average Response	Has Feedback	View Details	Mark Reviewed
jboyd	2 hours ago	100%	Yes		
ssmith	22 hours ago	100%	Yes		
ssmith	1 day ago	100%	Yes		
jboyd	1 day ago	100%	Yes		
ssmith	2 days ago	100%	Yes		
jboyd	3 days ago	100%	Yes		
ssmith	3 days ago	100%	Yes		
ssmith	3 days ago	100%	Yes		
jboyd	4 days ago	100%	Yes		
jboyd	4 days ago	100%	Yes		

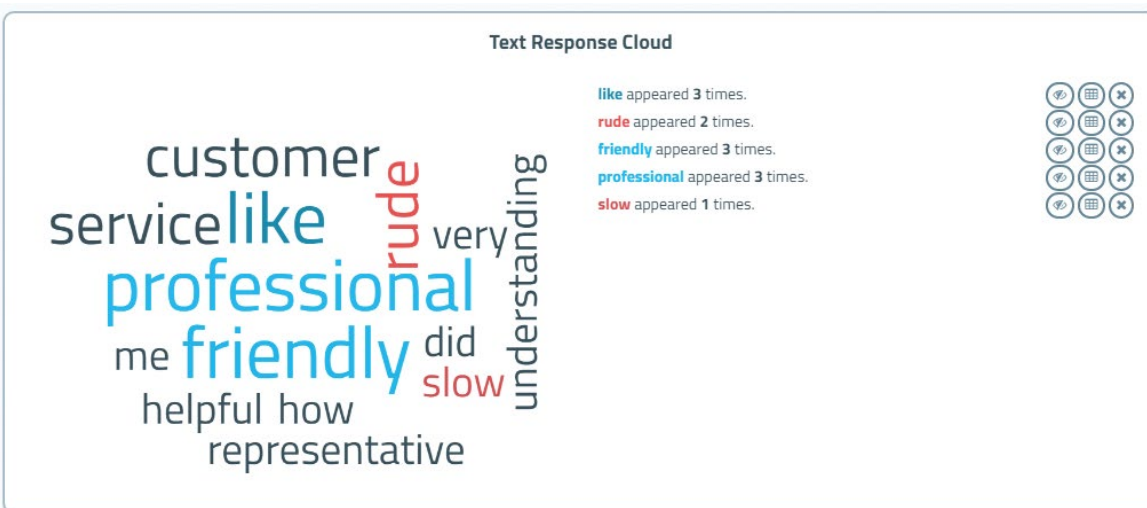
Show Reviewed

Top 10 Worst Interactions					
Agent ID	Completed	Average Response	Has Feedback	View Details	Mark Reviewed
jboyd	1 day ago	10%	Yes		
ssmith	51 minutes ago	33.3%	No		
jboyd	5 hours ago	33.3%	No		
jboyd	2 days ago	33.3%	No		
jboyd	3 days ago	33.3%	No		
jboyd	3 days ago	33.3%	No		
jboyd	1 week ago	33.3%	No		
jboyd	3 hours ago	40%	No		
ssmith	4 hours ago	40%	No		
jboyd	2 days ago	40%	No		

Show Reviewed

Feedback can be easily actioned at any level of the business, by management or a customer service representative, who each have access to all the information required via the dashboard. Specific feedback can also be read or listened to directly from the Survey Dynamix interface.

Survey Dynamix's text analytics function offers the ability to search for feedback responses containing particular keywords. **This capability allows users to add keywords to a Watch Words list which, in turn, enables Survey Dynamix to highlight those words in word clouds and survey responses so you don't miss relevant comments.**



# Summary

This white paper has explored the reasons why **detailed and accurate customer insights are important to any business in a highly competitive landscape**. Not only do insights ensure you are delivering the best in customer service, but they can also provide valuable data to ensure your products and services are meeting the needs of your market. **This is the competitive edge.**

The white paper has addressed the **drawbacks of many existing survey solutions and detailed the benefits offered by Survey Dynamix's fully integrated cloud-based solution**. These include a choice of survey medium, customisable surveys with flexible question types and responsive questioning, and easy integration with existing business systems which can automatically trigger surveys and enrich the reporting process. **Furthermore, the real-time reporting capabilities offered by Survey Dynamix provide the opportunity to act immediately on poor customer experiences to transform them into the type of positive experiences that earn loyalty.**

**For more information, please visit [www.surveydynamix.com](http://www.surveydynamix.com)**

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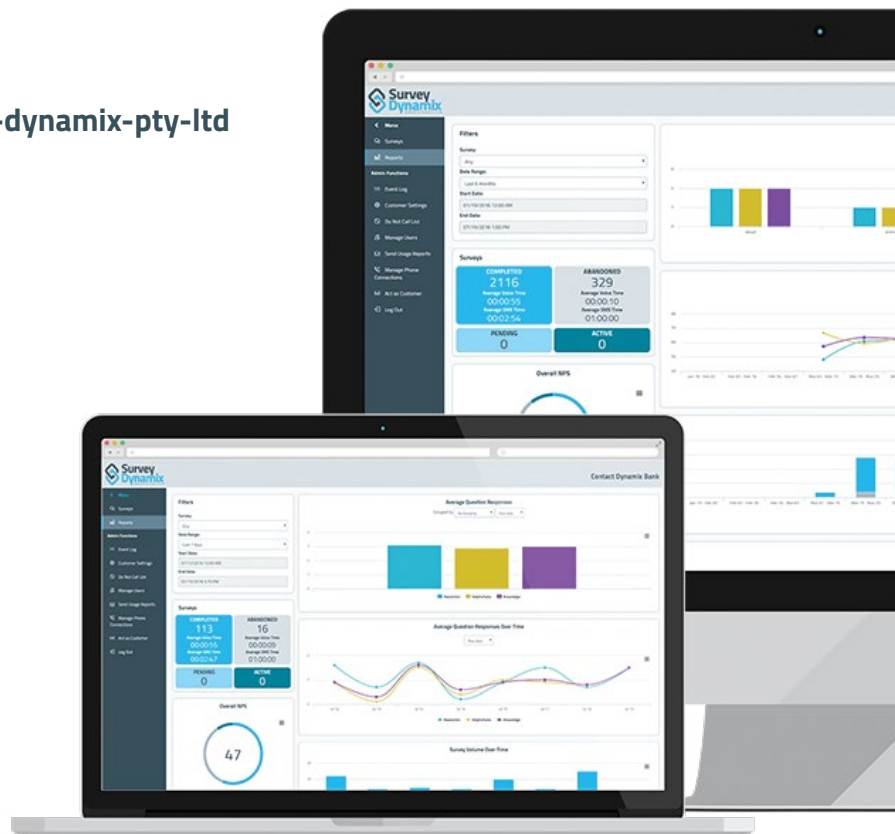
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