

THRIVING IN THE AGE OF THE CUSTOMER



HOW TO DESIGN AND BRING
TO LIFE YOUR CUSTOMER
VALUE PROPOSITION

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IT'S A CUSTOMER'S WORLD

Businesses and not-for-profit organisations are facing an environment of unprecedented change and technological disruption. Many have gone from limited local competition to ferocious global competition in just a few years and many don't know where their next competitor will come from. New internet enabled business models are disrupting not only companies but entire industries. Deciding how to move forward in a complex and changing situation is not easy.

“The balance of power in terms of information and choice has dramatically shifted over time towards the customer.”

Larry Freed, author of *Innovating Analytics*

Few people would argue that survival depends on understanding and meeting the needs of customers. Most organisations do a reasonable job satisfying most of their customers much of the time. But will this be sustainable in the medium to long term? Customers may be reasonably satisfied, but will that stop them being more receptive to a compelling offer from another provider?

There has been a massive shift in the balance of power from the supplier to the customer in recent years. Customers can now review an organisation's products, services, solutions and prices online, and quickly and easily compare them to hundreds of others. Social media also ensures that the good, the bad and the ugly of product and service experiences spread quickly and publicly.

In this fast paced world where goods and services are increasingly being commoditised there are three key questions for boards and executives today: How will our products and services stand out? How will we differentiate and add extra value? Can our current competitive advantage be sustained?

The answer to these questions lies in customer centricity, that is, in putting your customers at the centre of all your thinking, planning and decision making. That is really easy to say but very hard to do. Most organisations have a strong internal focus that is reinforced with systems, processes, metrics and entrenched behaviours. Great wisdom will be required to determine what parts of your heritage, systems, processes and culture should remain and what need to be transformed. Some things that created success in the past may need to be let go.

Customer centricity starts with defining value from the customer's perspective, not your perspective. Your customer's view of the world needs to become the driving force of everything you do and how you do it.

Few organisations are truly customer focused because it requires a painstaking analysis of who your customers are and what they need, and a critical assessment of how aligned your organisation is to those needs. Even knowing where to begin can lead to inertia for some organisations, whilst others find themselves going round in circles as they grapple with what to do and how to do it.

This paper outlines the starting point of your journey to customer centricity – **defining value from the customer's perspective** – and provides a practical “how to guide” for understanding customer needs in detail and defining value from their point of view. Defining and delivering a strong customer value proposition (CVP) will enable your organisation to deliver a customer experience that meets their needs and adds value, resulting in high levels of loyalty and advocacy. It will also give potential customers a compelling reason to choose your products, services and solutions over others, thus creating a real competitive advantage.

FROM THE CUSTOMER'S PERSPECTIVE

A CVP is not just your brand name, current product catalogue, website design or a simple marketing statement. It is your customer's main perceptions of you based on a combination of everything you offer, how your customer experiences this offering and how you can differentiate this offering from your competitors. It reflects the value your organisation can provide with its vision, values, history, culture, staff, products and services.

From a customer's perspective, an effective CVP answers the question "which organisation can best meet my needs?"

The key to a strong CVP is the perspective from which it is developed, and that perspective is from the customer. This is a significant differentiation from some traditional marketing efforts that seek to push ideas to the customer. A CVP is based on insights from the customer and seeks to draw the customer to the provider.

There are different terms used to describe a CVP such as customer promise and customer truth. Regardless of what you call it, having a clearly articulated CVP will enable you to embed a meaningful customer focus into the very heart of your organisation and deliver an experience that your customers value. As a result they are much more likely to continue choosing your products/services and recommend you to others.

Even if you haven't articulated your CVP, every organisation has one. Based on their own experiences, marketing and communications messaging, social media and peer group word of mouth, customers will have their own perceptions of your brand, your values and your products/services.

What kind of CVP does your organisation have?

- Actual CVP – the current CVP of an organisation, regardless of whether it has been articulated or communicated. The CVP may be perceived differently by customers and staff
- Desired CVP – describes the ideal offering an organisation can make to its target customers, but it may not be achievable in practice
- Achievable CVP – an articulated CVP that incorporates aspects of the desired CVP that can be delivered

In our connected world it is more important than ever to take control of your CVP and actively determine what the real customer truth is for your organisation.

CASE STUDY: UNDERSTANDING THE CUSTOMER'S PERSPECTIVE

Insync recently worked with an Australian motor group to help them understand their customers in order to define and differentiate their customer experience model. Insync undertook an online survey and a series of focus groups to explore what was important from the customer's perspective in the vehicle acquisition and ownership life-cycle, and to understand what makes an outstanding purchase experience.

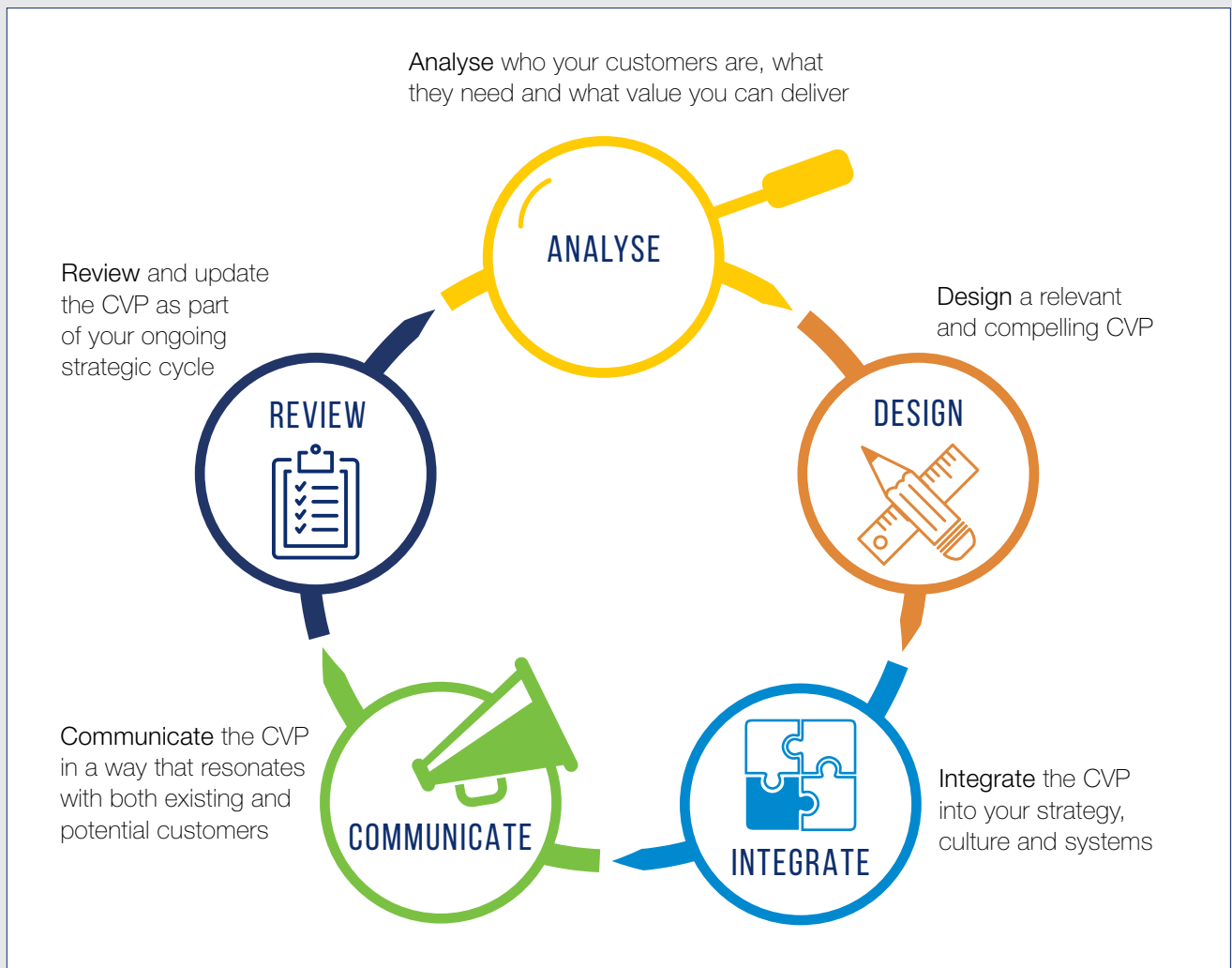
The insights collected led to the development of a customer experience framework centred on the mutual goal for car dealerships and their customers that had been identified in the research.

Based on this framework, the motor group has commenced work on operationalising the research, with the roll-out of the framework across all dealerships. The research and resulting framework will inform key components of the motor group's recruitment and resourcing plan and will result in major changes to its sales training and induction process.

USE A FIVE STEP CYCLE TO DELIVER YOUR CVP

Seeing the world through your customers' eyes is not easy and requires a shift in perspective away from a description of what you think your unique selling point is, for example, we are the cheapest, we are the biggest, we are the fastest, to a description of the value you deliver to your customers. Identifying, understanding and then delivering what your customers perceive to be valuable is not a trivial undertaking. It requires a systematic approach and a sustained commitment.

To articulate and deliver a compelling CVP, Insync recommends the five step cycle outlined below.



This cycle doesn't have a specific start or end point. The appropriate starting point depends where your organisation is on its journey to customer centricity. If this is something you are just starting to think about then it's best to start with the "Analyse" step. If your organisation has already designed its CVP but you aren't sure if you are getting the message across to your customers, then the "Communicate" step may be a useful place to start.

USE A FIVE STEP CYCLE TO DELIVER YOUR CVP

No matter which step you are up to in the cycle, you need to continually answer four key questions.

WHO are your target customers?	<p>The first element defines who your target customers are, describes their needs and expectations and defines value from their point of view.</p> <p>In order to understand your customers you need to understand their role within the organisation, the tasks they do each day, what they are trying to achieve and how they define a successful outcome.</p> <p>You also need to know the problems they face in their role, what's causing these pain points and what potential solutions might look like.</p>
WHAT value do you provide?	<p>The second element describes the products/services that your organisation offers and clearly articulates key features and benefits that add value to your target customers.</p> <p>Take a walk in your customers' shoes and have their pain points in mind when considering this aspect.</p>
HOW is your offering relevant?	<p>The third element focuses on creating a fit between the WHO, the WHAT and your organisation.</p> <p>It defines how your products/services are relevant to and valuable for your target customers.</p> <p>From an external perspective consider how you will add extra value to customers and help them achieve success.</p>
WHY is your offering better than others?	<p>The last and perhaps most critical element is the environment in which you are operating.</p> <p>Who else offers similar products or services? Who else might be the go-to supplier for your target customers, and what value are they offering?</p> <p>Consider how your products/services are unique, special and different from your competitors.</p> <p>Competitor insight is a critical factor when defining your CVP and will enable you to determine why customers should choose your products/services over others.</p>

STEP 1: ANALYSE



WHO ARE YOUR CUSTOMERS,
WHAT DO THEY NEED AND
WHAT VALUE CAN YOU DELIVER?

In order to design your organisation's value proposition, you first of all have to articulate the four key elements of your CVP:

WHO are your target customers?	WHAT value do you provide?
HOW is your offering relevant?	WHY is your offering better than others?

To answer these questions you need to involve internal and external stakeholders, and review internal and external data sources.

Internal perspectives

- Critically review marketing collateral and business documents, e.g., website, fact sheets, proposals, presentations to assess what you are communicating and the impression you are giving
- Review internal survey data such as an employee engagement survey to see what staff think your organisation is doing well and what could be improved with regards to customer focus
- Conduct interviews with key employees to discuss their "to-be" and "as-is" perceptions i.e., what do we want to be known for and what are we currently known for? Articulating the gap can be a very useful exercise

CASE STUDY: DEFINING YOUR TARGET CUSTOMERS

Insync helped a global medical technology company develop a market entry strategy into two selected Asian countries. Prior to entry, there was low awareness of the local market conditions, who the potential customers would be and what their needs and requirements might include.

The research was commissioned to identify the target audience and determine which products/services would be most valuable to them.

In collaboration with a local partner, Insync conducted more than 30 in-depth interviews with key decision makers and potential clients, and completed 500 online surveys. After analysing the results, Insync identified four key profiles of customers including key demographics and expectations.

Based on the findings Insync's client chose to only target two of those four customer profiles and customised their offering according to the specific needs of these groups.

- Facilitate focus groups to discuss staff perceptions of what your value proposition should be and how they would articulate each of the four key components: WHO, WHAT, HOW and WHY. Also get their thoughts on who your key competitors are and how their CVP differs to yours

External perspectives

It is important to not just rely on internal assumptions about what you think your customers need and how you think you are positioned to meet those needs. Customer feedback provides valuable insights into your customers' needs and how you are performing against those. Sources include:

- Feedback from recent customer satisfaction surveys or data from an ongoing customer engagement tool
- Conducting specific interviews and collecting customer feedback can elicit more qualitative insights about what your customers need, what their pain points are, what success looks like for them and their perceptions of your organisation and its products/services
- Win/loss data can reveal the types of customers or projects you're usually winning, thus what your customers think your strengths are, and also highlight trends in the types of customers and projects you have less success with
- It is important to consider the customers or prospective customers you lost and who chose one of your competitors. Seeking further feedback after you've lost a tender for example, can identify those areas you need to improve
- A competitor analysis will enable you to assess what your competitors are promising and what your point of difference could be. You might look at their websites, their advertising and published reports to understand their WHO, WHAT, HOW and WHY

STEP 2: DESIGN



DESIGN A RELEVANT AND COMPELLING CVP

Once you have a detailed understanding of your organisation's responses to the four key elements, you can summarise your findings and design your CVP.

As in the analyse phase, the design phase needs to incorporate the four key elements:

WHO are your target customers?	Design your CVP with your target customers in mind – it needs to be appealing, relevant and accessible to them.
WHAT value do you provide?	Talk about the products/services you offer and identify the key features that add value to your target customers.
HOW is your offering relevant?	Clearly communicate how your products/services are relevant i.e., how they can relieve your target customers' pain points and enable them to achieve success.
WHY is your offering better than others?	Demonstrate your point of difference and communicate why your products/services should be chosen over others.

It is important to work collaboratively when designing your CVP.

- Ensure your leaders and key decision makers are actively involved in the process. They need to be fully onboard if your CVP is to become an integral part of the organisation
- Don't forget your staff. They are the people closest to your customers who will be delivering the CVP in practice. It is critical to get their feedback throughout the process to ensure the CVP is talking the customers' language and to ensure they buy in to the final proposition
- Finally, ask some clients with whom you have a close relationship to review your CVP. Is it easy for them to understand? Is it relevant to their needs? In short, is your CVP getting the message across in terms of your organisation's WHO, WHAT, HOW and WHY?

Top tips for designing a relevant and compelling CVP

- A compelling CVP is authentic and easy to understand. It is not a slogan, catchphrase, positioning statement or jargon.
- Think "less is more" and limit information to a single block of text that contains:
 - A headline sentence: what is your product/service?
 - Two to three sentences: what does it do, for whom and why is this useful/relevant?
 - Two to three bullet points: what are the key features/benefits?
- Challenge yourself and your team to:
 - Get to the heart of where you are now and where you want to be; this requires deep reflection and discussion
 - Review your CVP critically; if a potential customer was assessing you and two competitors, would your CVP set you apart?
 - Articulate in a single sentence why your target customers should choose you
 - Ensure your CVP has your target customers' needs at its core and uses their language, not your perceptions of them
 - Make sure your CVP is authentic, believable and achievable

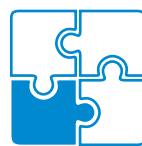
CASE STUDY: DESIGNING A CVP

Insync recently worked with a large peak body to help them better understand their members, including their experience as a member and their expectations and requirements. This insight was used to help inform key strategic initiatives, the organisation's member value proposition and brand positioning.

Insync undertook in-depth phone interviews with a sample of current and lapsed members. This provided important insight into the member experience, and also informed the design of the online survey that followed. The quantitative phase confirmed a number of hypotheses that were formed during the qualitative phase, and provided all members with an opportunity to provide feedback.

Recommendations included the need for greater clarity of the brand through strengthened articulation of the vision, mission and purpose of the organisation, and member segmentation to support targeted and relevant communications to specific member groups.

STEP 3: INTEGRATE



EMBED YOUR CVP INTO YOUR STRATEGY, CULTURE AND SYSTEMS

This is where you ensure your CVP and organisation fit together, and in doing so create a customer centric culture.

Once you have your CVP, before you start any external communication it is important to identify where on the CVP cycle you sit. Is the CVP an articulation of what happens currently (actual CVP), where you want things to be in the future (desired CVP) or a CVP that is achievable now?

Internal communication

Embedding your CVP is an ongoing task. It requires constant communication internally to ensure all staff are aware of it, understand the importance of it, can see how it applies to their role and understand how they can deliver it in practice. Leaders and HR have a key role to play here.

Delivering a compelling CVP requires strong leadership. The CVP needs to have a place at the boardroom table and customer focus needs to be embedded in your vision and strategy. Systems and processes such as training, goal setting and performance measures must also be aligned so that all staff are customer focused regardless of whether they interact with external customers on a daily basis.

CASE STUDY: INTEGRATING YOUR CVP

Insync recently partnered with a not-for-profit organisation to develop a customer charter to enable the organisation to deliver more customer centric services. The process involved a series of internal interviews and two workshops.

The objective of the second workshop was to identify key issues impacting delivery of the customer charter. Insync and the client discussed what needed to change and how ready the organisation was for such change. They then carried out a SWOT analysis of three core aspects of the business (strategy/metrics, processes/systems, people/culture) to assess which systems and processes would support and which would hinder delivery of the customer charter.

At the end of the session, three issues were identified as priorities and an owner was allocated to each. Each person was charged with the task of developing an action plan to shift the dial for their priority area, and to ensure the relevant systems and processes supported successful delivery of the customer charter.

The HR function can drive development of a customer focused culture and values, articulate desired behaviours, align recognition and reward systems and embed customer focus into recruitment, induction and development programs.

Bring employees on the journey

A new CVP or a significant revision of an existing CVP will almost certainly require considerable internal change. Employee engagement will be one of the keys to any change program. Employees need to be brought on the journey and ideally champion and drive the change. If you don't win the minds and hearts of employees and if they are not convinced of the need for change they will almost certainly frustrate it.

Identify enablers and barriers to success

Regardless of the type of CVP, a critical assessment of how you are placed to deliver your CVP is required. This assessment should focus on answering two key questions that will identify the enablers and barriers to success:

- What are the main things holding you back from delivering the CVP?
- What are the main things that exist that enable you to deliver the CVP, and what new or improved enablers are needed?

The extent to which you can currently deliver all or some of your CVP will determine your communications plan which is discussed in the next section.

If your critical assessment identifies that improvements are needed in order to move the dial towards full delivery of the CVP, action planning may be required and a SWOT analysis is a good place to start. This process will ensure that your CVP can be integrated into your organisation and that the claims it is making are realistic. There is no benefit in exaggerating your abilities and setting expectations you won't be able to meet.

STEP 4: COMMUNICATE

COMMUNICATE THE CVP IN A WAY THAT RESONATES WITH BOTH EXISTING AND POTENTIAL CUSTOMERS



There are a number of ways your organisation can communicate the value proposition to customers and prospects. The most common methods would be the website, social media, marketing collateral and advertising materials.

But don't forget that everything your organisation does needs to reflect the value you are offering to your clients. All your products, services and solutions need to align with your CVP and speak the same language. In addition, all staff need to be aware of the CVP and ensure they deliver it consistently. This will enable your CVP to become the "way things are done around here".

When thinking about communicating your CVP it is useful to revisit the four key elements:

WHO are your target customers?	Ensure you communicate in the way your target customers prefer. What medium is most relevant to them? Are they likely to prefer soft or hard copy, would receiving a fact sheet in the post cut through more than an email attachment, is a phone call or meeting for coffee a better way of keeping in touch than sending an email?
WHAT value do you provide?	In terms of content, focus your communication on the product, service or solution that is most relevant to your target customers. Which specific features will target their pain points?
HOW is your offering relevant?	Once you know who your message is targeting and what information you are presenting, you can link the two together and demonstrate the value that you will bring to the table. This is about communicating relevance and showing how you will enable your target customers to achieve success.
WHY is your offering better than others?	Assess how your key competitors are communicating their CVP. What is best practice in your industry? Are you presenting a clear and compelling reason why your target customers should use your products or services over others?

STEP 5: REVIEW

Clear, regular and transparent customer metrics will be another key to re-orienting the organisation's perspective to be more informed of the customer's point of view.

A much greater external perspective will be needed including increased scanning of what your competitors are doing and how they are perceived by your customers. It will be more important than ever to understand the gaps between what your customers expect and what you offer – and the gap between what you offer and what your best competitor offers.

"WHAT GETS MEASURED GETS DONE"

The best way to really know if customers are experiencing your CVP in the way you expect is to ask them. This can take the form of ad hoc conversations during meetings or briefings, a project review phone call or a regular survey.

Over the last five years, Insync has conducted over 500 customer surveys with clients across a wide range of industries. Whilst each survey is customised to some degree, a set of common questions are usually included. A review of this data enabled us to identify a clear pattern when looking at those items that are highly correlated with the Net Promoter Score. Based on our analysis, we identified four key drivers of customer advocacy:

- Understanding what customers need
- Delivering on customer perceptions of value
- Meeting customer needs and expectations
- Choosing you over others



REVIEW AND UPDATE THE CVP AS PART OF YOUR ONGOING STRATEGIC CYCLE

These four drivers can be overlaid on to the CVP model as follows:

Drivers of advocacy	CVP element
Understanding what customers need	Who are your target customers?
Delivering on customer perceptions of value	What value do you provide?
Meeting customer needs and expectations	How is your offering relevant?
Choosing you over others	Why is your offering better than others?

The table below presents the survey items from Insync's customer engagement framework that can be used to measure performance against each of the CVP elements.

WHO are your target customers?	Driver 1: Understanding what customers need <ul style="list-style-type: none">• The organisation tailors advice appropriately, e.g., to my organisation, role or circumstance• The organisation actively seeks to understand my requirements• I have a good working relationship with the organisation's staff• The organisation's staff have my best interests at heart
WHAT value do you provide?	Driver 2: Delivering on customer perceptions of value <ul style="list-style-type: none">• The organisation provides products/services that are good value for money• The organisation adds value to my business
HOW is your offering relevant?	Driver 3: Meeting customer needs and expectations <ul style="list-style-type: none">• The organisation takes responsibility for meeting my needs• The organisation provides products/services that meet my expectations
WHY is your offering better than others?	Driver 4: Choosing you over others <ul style="list-style-type: none">• The organisation is the most suitable partner for people like me/us to buy from• The organisation is an ideal business partner for my organisation

Apart from ensuring your organisation is able to deliver your CVP, you also need to be mindful that your CVP may need to be updated or changed. In line with annual budget and strategic cycles it is worth reviewing your CVP to ensure it remains current and relevant.

As in the communication step, the four elements of the CVP provide a useful framework for review:

- **WHO:** Are you still targeting the same customers? If so, has their industry/job/role changed? Have their needs changed? Has their perception of value changed?
- **WHAT:** Have you developed any new products, services or solutions? Do you need to communicate new or different features?
- **HOW:** Are you able to deliver new or additional value? Are you able to make new or additional claims regarding how relevant your offer is?
- **WHY:** Are there any new competitors? What is their CVP claiming? Have existing competitors improved their offer in some way? Is your competitive advantage sustainable?

HOW INSYNC REFRESHED ITS CVP

Insync's CVP was designed and implemented in collaboration with its employees and clients. It is now an important part of Insync's strategy and culture, and is regularly reviewed to ensure Insync is well placed to be the first choice of its target customers. When refreshing its CVP, Insync followed the process presented in this paper. Its approach to each stage is briefly detailed below.

ANALYSE



Before commencing the analysis, the project team produced a scoping document that outlined its objectives, approach and timeline. The team obtained approval and buy-in from the leadership group and communicated details of the project to employees.

Insync started the analyse phase by reviewing two key data sources: its post project customer feedback and win-loss data. In addition, Insync conducted interviews with key internal opinion leaders and facilitated a focus group to collect feedback and suggestions from staff.

Insync identified early on in the project that incorporating an external perspective was of critical importance. To this end it conducted detailed desk research to assess the offering of its key competitors and conducted a series of interviews with key clients which covered points such as the client's satisfaction with Insync, Insync's strengths and weaknesses, and the likelihood to recommend Insync.

DESIGN



After consolidating all the data and feedback, Insync designed a series of bullet points covering the WHO, WHAT, HOW and WHY of its surveys, research and consulting offering. These were initially discussed and edited with the leadership team and other key decision makers within the business. Team members challenged each other to ensure the CVP was concise, relevant and compelling.

INTEGRATE



An important requirement of embedding Insync's CVP was to make the process of articulating it very transparent. Throughout the entire process, the project team regularly communicated its objectives and progress to the entire organisation to build awareness and encourage buy-in from every staff member.

Insync used a staff focus group and results from a recent comprehensive staff survey to collect feedback on how its current systems and processes supported or hindered the implementation of its CVP. A number of opportunities for improvement and innovation were identified and subsequently managed through an action planning process.

COMMUNICATE



Insync identified that its website and social media would be key methods for communicating its CVP externally. The CVP project informed a broader website review project and Insync's marketing staff were widely consulted during the CVP design and implementation.

Insync also needed to ensure its company collateral such as fact sheets, proposals, presentations and reports consistently supported its CVP. In order to align the different channels it developed a communication strategy and continues to work closely with its marketing team.

REVIEW



Insync put in place two means to review its CVP. The post project customer satisfaction survey was updated to include the CVP so client perceptions of Insync's performance are being measured on an ongoing basis. Insync also conduct a company wide Alignment and Engagement survey every 18 months and its CVP will be included to assess internal perceptions of both the CVP and how the organisation is performing against it.

WE WILL HELP YOUR ORGANISATION ACHIEVE SUSTAINABLE HIGH PERFORMANCE BY IMPROVING YOUR EMPLOYEE AND CUSTOMER ENGAGEMENT

We offer you:

- Partnership – we will be agile, flexible and responsive to your individual needs
- Confidence – you will work with passionate industry experts who use well proven frameworks, tools and technology
- Results – you will receive evidence based insights and actionable advice that will make a real difference to your organisation

CVP WORKSHEET

KEY QUESTIONS TO ASK:

ANALYSE

Analyse WHO your customers are and WHAT they need. Explore what value you can provide and HOW your offering is relevant. Also consider WHY your offering is better than others.

- What do your target customers do and what are they trying to achieve?
- What do they value most?
- How are your products/services relevant?
- How can you help your customers achieve success?
- What do your competitors state as their CVP and what are your points of difference?
- What data do you have to analyse?
- How can you incorporate customer feedback into the process?

DESIGN

The design phase is about thinking, consultation and collaboration. Challenge your team to articulate a CVP that is relevant, compelling and easy to understand.

- What will appeal to your target customers?
- Which elements or features of your offering will you focus on that add the most value?
- How will you relieve your customers' pain points and enable them to achieve success?
- How can you demonstrate your relevance?
- What makes your CVP different and more compelling than others?
- How will you involve internal stakeholders and staff in the process?

INTEGRATE

Integration requires a critical assessment of how well placed you are to deliver your CVP and significant changes may be required.

Your CVP must be regularly reinforced by all levels of the organisation and across all departments to ensure it becomes part of your organisational DNA.

- How will your CVP link with your organisational strategy, external brand, business metrics and culture?
- What is currently supporting or hindering integration of the CVP?
- What avenues can be used to ensure the CVP continues to be referenced and reinforced internally?
- What other business as usual practices can incorporate a CVP discussion?

COMMUNICATE

Communicate the CVP in a way that resonates with both existing and potential customers.

- What communication channels do your target customers prefer?
- What communication channels do you have available? Do you need to invest in new channels?
- How can you best communicate value and relevance?
- How will your CVP be reflected alongside your vision, mission, goals, values and strategy?
- How are key competitors communicating their CVP and how effective is it?

REVIEW

Reviewing internal and external perceptions of your CVP allows you to find out if it is resonating. Ongoing reviews also enable you to modify your CVP in light of changing customer needs or market dynamics.

- How will you measure the success of your CVP? What is your baseline? What is your improvement target?
- How will you collect feedback on your CVP from customers and staff?
- How will you assess if your CVP needs to be changed or updated?
- How will CVP changes/updates be managed and communicated?

NOTES:

ANALYSE

DESIGN



INTEGRATE



COMMUNICATE



REVIEW

HOW INSYNC CAN HELP

CVP DESIGN AND CONSULTING

Insync has experienced consultants who will partner with you and your organisation to navigate the five steps outlined in this paper. Alongside its survey offerings and technology, Insync can run customer and stakeholder focus groups, action planning sessions and CVP workshops.

CUSTOMER ENGAGEMENT

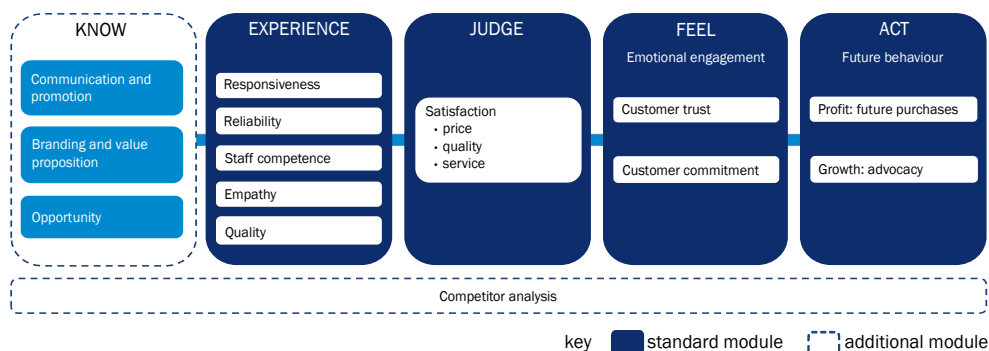
A survey can help you measure the extent to which customers are experiencing your CVP. Insync's customer engagement framework (see below) is based on leading academic research (a list of references is available on

request) and provides a full picture of the customer journey and experience.

It shows how customers experience the services/ products offered and develop an overall judgment. This leads to customers developing a personal relationship with the provider and becoming emotionally engaged, which impacts their future behaviour.

It shows the linkages from the customer experience, to satisfaction, to how customers feel about the organisation and what they're going to do about those feelings, be it repeat purchases or advocacy in the marketplace. In short, the model links product and service delivery all the way through to what actions customers are going to take in the future.

CUSTOMER ENGAGEMENT FRAMEWORK



CUSTOMER ADVOCACY MONITOR – PROCESS



CUSTOMER ADVOCACY MONITOR – PORTAL



EMPLOYEE ALIGNMENT AND ENGAGEMENT

To help you analyse the extent to which your CVP has been integrated, organisation-wide surveys such as Insync's Alignment and Engagement Survey (AES) can be very useful.

Customer focused organisations do the following:

1. **Energise** – employees will be energised and inspired by the organisation and its senior leadership team; the organisation will have a clear and engaging long term direction and purpose, with a compelling and achievable CVP at its core
2. **Execute** – the organisation will align its plans and activities to the achievement of its CVP and other

long term goals; it will invest in the development of its people and systems to ensure they facilitate effective delivery of the CVP

3. **Engage** – employees will be highly engaged and proud to work for the organisation; they will understand that the role they play in building strong customer relationships is important for the success of the organisation

By assessing how well the organisation is performing on these factors, the AES can identify the issues potentially acting as barriers to achieving the desired goals, where those problems are and what actions can be taken.

A sample executive summary (scan) from the AES report for sample company Axis Foundation is shown below.

AES EXECUTIVE SUMMARY

Your Alignment and Engagement scan

The Alignment and Engagement scan below shows the alignment and engagement results of TAS compared to Axis Foundation overall. Results are displayed as the percentage of respondents who scored items either a six or a seven on the seven point rating scale. The colour coding indicates how the average raw score compares to organisations in Insync Surveys' benchmark database.

Number of TAS responses: 158

		TAS	All staff
Energise	Long term direction —whether strategies and changes are clearly articulated, communicated and accessible and it's clear how strategies will be achieved	34%	56%
	Senior leadership —whether senior leadership exemplify best practice, inspire, encourage innovation, and acknowledge and maximise talent	33%	54%
Execute	Team leadership —whether managers are trustworthy role models who build teamwork, communicate well, coach and mentor, and value their teams' opinions	57%	70%
	Team effectiveness —whether work groups use challenging goals, embrace change, celebrate achievements, focus on customer service and compare actions against plans	48%	60%
	Performance focus —whether the organisation is open to new ideas, putting customers at the centre of decision making and having systems that help staff meet their promises to customers. Organisations that are outwardly oriented outperform their peers on most productivity metrics. This applies to all sectors	35%	56%
	Investment in people —whether employees are supported with training and development, reward and recognition programs, work-life balance initiatives and performance appraisals	33%	49%
	Investment in systems —whether systems allow employees to do their job well, concerns are addressed and there's good internal customer service	26%	57%
	Alignment —whether employees, teams, systems, processes and customer strategy are aligned to the organisation's long term goals	39%	58%
Engage	Engagement —whether employees are committed to and emotionally engaged with the organisation and its goals, and they promote and act in its best interests	49%	64%

Your results compared to the benchmark database.

Legend:

- Bottom decile
- Bottom quartile
- 2nd and 3rd quartile
- Top quartile
- Top decile

HOW INSYNC CAN HELP CONTINUED...

EVP DESIGN AND CONSULTING

Insync recently wrote a how to guide on creating a compelling EVP. A strong EVP will drive talent attraction and retention. Your EVP should sum up the essence of your brand, authentically reflecting who you are and what you offer as an employer. It should be created with the same care and effort that's devoted to your CVP.

This paper and others that offer a wide range of action-oriented employee and customer insights can be found at www.insyncsurveys.com.au/research

PROFITABLE GROWTH CYCLE

In previous Insync research drawing upon experience involving around 1,000 employee and customer surveys, Insync developed the Profitable Growth Cycle. It shows the relationship between employee engagement and retention, and customer loyalty and advocacy.

High growth organisations understand that great customer outcomes are achieved as a result of highly engaged, empowered and well supported employees. Investment in employees leads to a sustainable, high performing workforce that can deliver the promises made in the CVP and build long term customer relationships.

The 44 page research paper titled, The 5 people drivers of the Profitable Growth Cycle, is included on our website at www.insyncsurveys.com.au



ABOUT INSYNC

Insync helps your organisation achieve sustainable high performance by improving your employee and customer engagement.

With over 25 years' experience, we're experts in customer research, employee engagement surveys, exit interviews, 360 feedback and leadership team and board evaluations. We also assist clients with focus groups, action planning, change management and developing and reviewing EVPs and CVPs.

We've conducted over 1,000 employee, customer and board research projects in the last five years. We have helped ACCC, AFL, ASX, Cathay Pacific, Country Road, Chevron, CSIRO, Fairfax, GrainCorp, John Holland, Johnson & Johnson, KPMG, Metro, Mitsui, Nufarm, QBE, Salvation Army, Swire, Sydney Water, Toll, Visy, YMCA, federal and state government departments and agencies, many local councils and most universities.

We have delivered surveys, research and consulting projects in around 100 countries and 40 languages. We have made significant investments in our people, processes, culture and technology to ensure that we provide cost-effective and actionable insights to clients that make a real difference to their organisation.



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