

Our Customer Experience Process

1. **To determine if our expertise is right for your organization, The Voice Customer Experience provides a complimentary phone consultation.** We want to provide your organization with the best possible experience and we will never take on a client that is outside The Voice Customer Experience's expertise. On this phone consultation we will ask questions about your organization's goals in seeking a customer experience consultant.

Some goals our clients have:

- Thoroughly understand their ideal customer and target market
 - Analyze what their competition is doing and what they can do to capture more market share
 - Acquire more conversions off their website
 - Receive more phone inquiries and/or foot traffic from their advertising
 - Convert more inquiries into sales
 - Have a more positive online presence
 - Build a larger audience on social media
 - Foster repeat and upsell business
 - Increase retention and customer satisfaction
 - Build long-term, loyal relationships with customers to provide their organization with referrals
 - Gauge where customer engagement and satisfaction is at currently and providing metrics to monitor progress
 - Have a cohesive brand image, message and experience
2. **Based on your needs and goals, The Voice Customer Experience provides an estimate for your review and follow-up questions.**
 3. **When you engage The Voice Customer Experience to be your customer experience consultant, we start with an in-person meeting with all the stakeholders to identify your target market, competition, and the customer journey map.** At this meeting we will look at all the touchpoints a prospect and customer sees (ads, mailers, invoices, email newsletters, etc.). The Voice Customer Experience wants to look at everything the prospect and customer sees from the time they become aware of your business through their decision to buy or not, and if they make a purchase, the touchpoints beyond including retention/repeat/upsell business efforts and referral marketing efforts. The Voice Customer Experience will prepare in advance for this meeting by researching your website, electronic media and advertising sent to us in advance, online reviews and social media. Be prepared to come to this meeting with samples of all your marketing materials and any reports (such as retention reports, sales reports, Google Analytics, previous customer survey results, etc.) Don't worry, we will provide you with a list of everything you need to prepare for this powerful half-day brainstorming meeting!

4. **In some cases our clients have us conduct secret shops (online, phone and/or in-person) on their staff and/or competition.** These secret shops are more than just a report! Included with the report will be recommendations to improve the customer experience.

Some areas we review are:

- a. Physical location first impressions
- b. Email and phone etiquette
- c. Sales and customer service skills
- d. Professionalism

Sometimes we find the staff needs some customer service training and The Voice Customer Experience has proprietary curriculum that can be customized for your organization.

5. **The Voice Customer Experience then analyzes all the data collected and draws conclusions.**

6. **The Voice Customer Experience will provide a thorough report and plan of action to meet your goals.** We meet again (preferably for another half-day meeting) to discuss the plan of action, answer questions and discuss next steps. Some companies have different marketing disciplines working in silos. For example, the organization might have one company doing their website, another company doing their traditional advertising, another company doing their digital marketing, another company doing their social media, another company doing their graphic design. Our Customer Experience Plan of Action can be shared with all those disciplines as a means of getting everyone working together and on the same page. Sometimes, we will find that a marketing provider a client has been engaged with is not meeting expectations. In these cases, we will be candid and honest. The Voice Customer Experience has a network of vetted, trusted providers to whom our clients can have access.

Our network includes expert marketing services providers in the following areas:

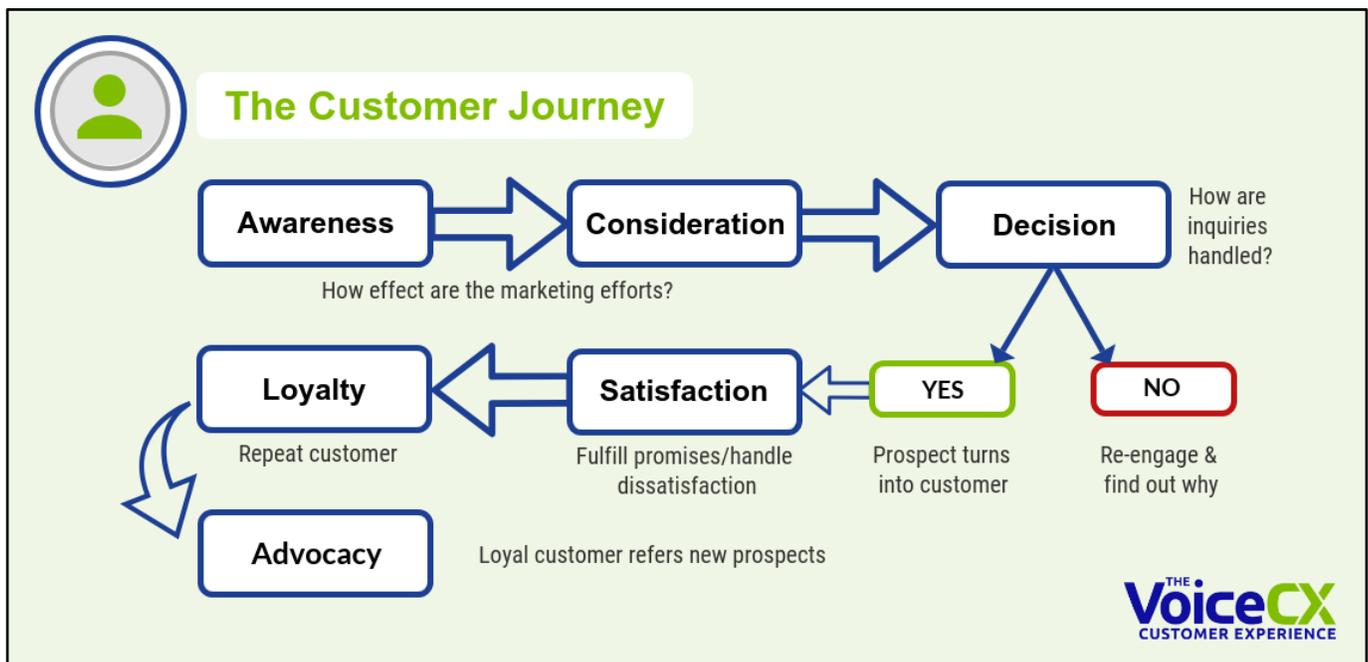
- a. Website usability and design
- b. Branding and graphic design
- c. Brand messaging and marketing copywriting
- d. Search engine optimization (SEO) and Pay-per-click (PPC)
- e. Social media marketing
- f. Traditional advertising
- g. Sales coaches/trainers
- h. Email marketing
- i. Full-service marketing agencies

7. **Many clients retain our services to ensure the plan of action is being carried out properly.** Some clients choose to take the report and plan of action and run with it. Either way, we will check in with our clients to see how they are doing and if they have questions along the way. We love to see results and staying in touch with our clients allows us the opportunity to find this out. If we can be of service at any time after delivering the final report and action plan, we are here to serve your organization.

Client Meeting Checklist

To make the most of our time together at our initial half-day meeting, please send any items on this checklist to The Voice Customer Experience two weeks prior to our brainstorming meeting so that we may review these items in advance and be prepared.

This is not an all-inclusive list. You may be doing things not mentioned on this list. Conversely, there may be some things on this list you are not doing. Think in these terms: Everything your prospects and customers see, we want to see. Every metric report on marketing ROI, sales, retention and repeat business your organization has available, we want to see. **To help think about everything, this diagram may help.**



If you have questions about anything on this list, please feel free to contact us to discuss your questions. The Voice Customer Experience welcomes all questions!

REPORTS

- Sales reports (sources of inquiries, close ratios, budget spent for various leads sources, cost per lead, conversion per lead source, etc.)
- Repeat business reports
- Retention reports
- Referral marketing reports
- Google Analytics, SEO and other PPC reports available
- Previous and most current customer satisfactions surveys/reports

MARKETING MATERIALS (touchpoints your prospects see/hear when becoming aware of your organization)

- Direct mailers
- Print ads
- Business cards
- Brochures
- Flyers and other print marketing collaterals
- Radio spot recordings
- TV spots
- Marketing videos
- PPC ads
- Website ads
- Website URL
- Social media URL's

COMMUNITY INVOLVEMENT

- List of community involvement – giving back/public relations efforts
- Sponsorship agreements with community involvement (what you give and in exchange what you get)
Include sponsorship deliverables (ex. ad in the program, etc.)

SALES FORMS

- Proposal
- Estimate forms
- Contracts, terms and conditions
- Warranties
- References list
- Invoices

ONGOING MARKETING (everything you send to a customer after they have made a purchase that you use to stay in touch with the customer)

- Email marketing
- Direct mailers
- Referral marketing programs
- Loyalty programs
- Customer satisfaction survey templates