

# Transforming Customer Satisfaction Reporting to Identify At-Risk Customers

Sales teams were unable to utilize legacy customer satisfaction data to proactively identify high-risk customers. We automated a monthly report that highlighted risks in accounts to all levels of the sales organization, resulting in proactive customer interventions and lower customer attrition.

## CLIENT CHALLENGE

The client had a large database of customer feedback that had incredible customer information that would be very useful in the hands of the salespeople, but was inaccessible. They asked us to develop a monthly report that highlighted customer satisfaction trends and comparisons. Technical resources required for complex sales took too much time to engage.

- Customer satisfaction insights missed because historical trend data unavailable
- Geographic based performance trend comparisons needed
- Valuable metrics and context data inaccessible in legacy customer satisfaction system



## HOW WE SOLVED IT

Our consultant developed an automated monthly regional report by extracting key trending data from the customer satisfaction system.

- Worked with leaders to identify meaningful metrics and delivered regular and automated customer satisfaction insight
- Designed a regional report to extract the raw data which automatically applied filters and formatting
- Provided anecdotal (e.g. customer comments) and valuable metrics on sales team performance
- Highlighted geographically based trend comparisons

## BUSINESS IMPACT

Better informed sales teams equipped to identify and capitalize on sales opportunities and proactively reach out to unsatisfied customers.



Provided sales teams with succinct, usable key customer satisfaction trending information



Sales identify high-risk customers earlier and take action to remedy issues



Better informed sales teams now equipped to identify new sales opportunities



More efficient and effective collaboration with partner organizations on a global level expanded