WHAT THE BEST COMPANIES DO

Customer Effort Audit Tool

Introduction

The Customer Effort Audit Tool enables you to identify the channel(s) where your customers are expending the greatest effort (e.g., Web, IVR, Phone) and directs you to resources that will help you reduce that effort. With this tool, you will answer these core questions:

1. **What can I do to reduce customer effort on a channel-by-channel basis?**
2. **Which channel offers the greatest opportunity area to reduce customer effort?**

Instructions

1. Answer the set of yes/no questions for channel selected. The "no's" are areas to consider changing.
2. Rate each channel's attribute categories on a scale of 1-5 on two criteria:
   a. How much effort is this area causing customers?
   b. How hard is this attribute to change?

Web Site

Simply answer the “yes/no” diagnostic questions. Each question that receives a “no” response indicates a potential area of high customer effort.

Attributes	Effort Diagnosis Questions by Attribute	Response: Yes or No (Y/N)
Navigability	Is information written in customer (versus company) language?	
	Is the site navigation designed for the customers you want to have use it?	
	Is the information accessible to customers in a variety of ways (event-based, product-based, *and* question-based)?	
	Is it easy to access the Web site (e.g., easy authentication or login)?	
	Have you ensured that your most-leveraged content is not buried in your Web site (users can find most content and access most functionality relatively quickly)?	
	Is it reasonably easy to contact customer service via the Web site?	
	Are customer service phone numbers intuitively organized?	
	Are there an appropriate number of phone numbers visible to customers?	
Information Quality	Do you make an appropriate amount of your knowledge base available on the Web site?	
	Is information prioritized intuitively for the customer?	
	Is the information of high quality?	
	Is the site language appropriately tailored to the customers you want to have use it?	
	Do you prioritize service information based on seasonal differences when appropriate?	
	Do you prioritize service information based on call volume drivers?	
Functionality	Can customers complete all reasonably simple service tasks on the site?	
	Is the site functionality appropriately tailored to the customers you want to have use it?	
	Once a customer completes a transaction, do you proactively offer related transactions or information?	
	Can customers track the status of an issue or purchase online?	
	Do you offer auto-fill or saved customer information whenever possible?	
	Do you have discussion boards?	
	If so, do you monitor them for quality?	
	If so, do you have employees participate in discussion boards?	
	Do you provide incentives to “power users” to participate in discussion boards?	
Metrics Do you track...	Number of clicks between pages	
	Number of searches	
	Length of time on the site	
	Number of pages visited	
	Ease of password reset	
	Number of failed login attempts	
	Age of knowledge base articles	
	Frequency of customers tracking status	
	Web issue resolution: number of live channel customers who first tried to resolve issue on the site	

Source: CEB, 2013.

IVR

Simply answer the "yes/no" diagnostic questions. Each question that receives a "no" response indicates a potential area of high customer effort.

Attributes	Effort Diagnosis Questions by Attribute	Response: Yes or No (Y/N)
Navigability	Do you communicate to customers what they can use the IVR for?	
	Do your reps help customers understand how to use the IVR?	
	Is it easy for customers to understand which options to select?	
	Are the options grouped intuitively for customers?	
	Does the IVR use customer (versus company) language?	
	Do you allow customers to skip listening to information that is not relevant to their inquiry?	
	Does the IVR inform customers of important information before they proceed through it (e.g., that the center is closed, etc.)?	
	If you have speech recognition, do you also give customers the option of using touchtone?	
	If customers must choose between a set of options, are they routed to specific rep queues?	
	Do you make your tree available online or via printed collateral?	
	Do you prioritize high call volume issues in the IVR (e.g., product recalls, alerts, etc.)?	
	Do you tell customers the number of options they will hear?	
	Have you tested how much time it takes to read your menus?	
	Have you solicited rep feedback about the IVR experience?	
Information Quality	Do you offer FAQs to customers through the IVR?	
	If so, is it clear to customers what FAQs they can expect to find?	
	Is the FAQ information in customer (versus company) language?	
	Do you update FAQs regularly to include the most important information?	
Functionality	Do you offer a zero-out option?	
	Do you allow opt-outs for frequently repeated information (e.g., bank account balance, menu options, etc.)?	
	Can customers save their IVR preferences or favorite transactions?	
	Do you relay information captured in the IVR to rep desktops via CTI?	
	Do you pull repeat callers out of the IVR or offer a "fast track"?	
Metrics Do you track...	Zero-out rate	
	Accuracy of routing (e.g., number of transfers)	
	Completion rate	
	How much time it takes the average customer to proceed through the IVR	
	Accuracy rate of voice recognition routing	
	Customer feedback about the IVR experience	

Source: CEB, 2013.

Phone

Simply answer the “yes/no” diagnostic questions. Each question that receives a “no” response indicates a potential area of high customer effort.

Attributes	Effort Diagnosis Questions by Attribute	Response: Yes or No (Y/N)
Resolution	Do you provide incentives to reps around issue resolution?	
	Do you routinely reinforce the importance of issue resolution with reps?	
	Do you monitor reps for accurate issue diagnosis?	
	Do you treat customers preferentially on their second (or greater) call?	
	Do you root cause the sources of multiple contacts?	
	Do you allow reps to treat different customer personality types differently (i.e., provide emotional resolution)?	
	Do you require reps to own each issue to resolution (even when it requires involvement from other parties in the organization)?	
	Do you allow reps to call customers back?	
	Do you encourage reps to forward-resolve appropriate related issues?	
	Have you audited internal policies to ensure that they are not causing multiple calls to resolution?	
	Do reps have the ability to e-mail customers with follow-up information?	
	Do reps offer appropriate alternative solutions when they have to say no to a customer?	
	Do you inform customers when certain issues can and cannot be resolved?	
Transfers	Are customers routinely routed to the appropriate specialists when necessary?	
	Do you offer warm transfers when necessary?	
	If not, do you avoid making the customer repeat information?	
Call Processes	Do your escalation reps track when and why they say “no” or “I can’t do that”?	
	Do you act to change resolution obstacles (when appropriate)?	
	Do you only ask customers for information that you immediately need?	
	Do you avoid asking customers for information that they have already provided through the IVR?	
	Do you avoid asking customers for information that you could get from internal sources (e.g., account information, filed information)?	
	Do you call other stakeholders on your customers’ behalf to save your customers a step?	
	Do you require customers to fill out forms only when it is absolutely necessary?	
	Generally, are your forms written in customer (versus company) language?	
	Do you collect rep feedback on language used in forms?	
	Do you offer customers the option of returning forms in alternate channels (e.g., fax, e-mail, online)?	
	Do you confirm receipt of information?	
Wait and Hold Time	Do you inform customers of queue location and approximate time?	
	Do you offer callback functionality during peak periods?	
	Do you monitor for excessive hold time?	
	Do you set customer expectations around time to resolution?	
Metrics Do you track...	Issue resolution rate	
	Callback rate	
	Callback type analysis	
	Transfer rate	
	Warm versus cold transfer rate	
	Customer Effort Score—CEB’s customer effort metric	
	Measures of customer time spend (e.g., hold time, time spent in IVR, wait time, etc.)	
	Quality assurance: accuracy of information	
	Quality assurance: issue diagnosis	

Source: CEB, 2013.