Customer Loyalty Survey

Pilot & Program Overview

Overview:

The Customer Loyalty survey includes eight questions sent to leaders and decision makers in our client organizations. This program replaces the previous NPS (Net Promoter Score) survey and is planned to pilot and launch in Q4 2018.

In preparation for the customer launch, we want to give customer-facing Mitchell employees the opportunity to experience the survey as if they were customers. Those participating will receive an email inviting them to participate in the survey.

Once the internal beta launch is complete, we will pilot the survey with a small sub-group of customers. Upon success, we will then launch the survey to our selected customer base. The survey will be administered in three of the four quarters per year (customers will only receive the Customer Loyalty survey once per year).

Timeline:

- Mitchell employee beta: October 2018
- Customer Pilot: November 2018
- Customer Launch: December 2018
- 2019 Surveys: Q1, Q3 & Q4

Note: Q2 is skipped as the Brand Survey is administered that quarter.

What Comprises Loyalty?

1. Table Stakes

You have what I need. I like what you have relative to my other options & the price is within my target range.

2. Effort Quotient

It's relatively easy for me to get the benefits I want from your product or service.

3. Satisfaction Drivers

You consistently deliver on what I expect & is important to me with your product or service.

4. Degree of Downside

I don't expect perfection; however, injuries to my confidence must be rare & repaired.

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FAQ:

Q: What is the Customer Loyalty Survey?

The Loyalty Survey provides Mitchell with insights regarding customer likelihood to purchase/renew with Mitchell. It is designed to be relevant across all business units, focused on customer satisfaction with the delivery of our solutions and services. The program was built by a cross-BU team and approved by Alex and the GMs in May 2018 with a target of end-of-year launch.

Q: Which clients will receive the survey, and how often?

The target recipients for the survey are leaders in our client organizations. Since the measure is loyalty, decision makers and key influencers for purchase decisions are the target respondents.
The survey will be sent once per year to each identified leader.

Surveys will be sent quarterly, with the exception of the quarter that the Brand Survey is sent to a similar audience. The list of key decision makers will be divided into three groups, with renewal timing taken into consideration.

Q: What are the eight questions customers will be asked?

Customers will be asked to rate, on a scale of 0 (disagree) to 10 (agree), their agreement with the following statements:

1. Mitchell's overall solution is the best fit for my company's needs.
2. It's easy to get the results I expect from Mitchell.
3. Mitchell's innovation is aligned with where the industry is moving and with my business's needs.
4. The value our organization receives from Mitchell's products and services is worth the price paid.
5. Issues that arise are resolved quickly, efficiently and to my satisfaction.
6. Mitchell is responsive to my business needs.
7. Mitchell offers easy to use, quality products.
8. I am likely to recommend Mitchell to a friend, colleague or business associate.

Q: How can I find the results of my customer's survey?

Individual survey results will be posted to the master SalesForce client account in the section titled "Survey Responses". The key account owner in SalesForce will also get an email when results are posted.

Trend reports and additional information will be communicated to ELT, SLT and stakeholders about these as they progress.

Q: What is the goal score?

Data gathered in 2019 will provide a baseline for establishing a target goal. Upon evaluation of results, the ELT and SLT will work with stakeholders to determine the appropriate goals for this metric.

FAQ cont...:

Q: What if I need more detail from my clients?

We anticipate that we will need more insights and details following the survey. It is intended to be an indicator of preference of Mitchell's solutions and services overall, not necessarily for one particular product. This data may be used to open a larger conversation you would like to continue with your clients.

Q: Is SalesForce used to manage the survey recipient list?

Yes, the survey list is maintained in SalesForce, utilizing the previous "NPS" list tag. The sales and client service enablement teams, in conjunction with client facing employees, will identify the appropriate clients to survey and tag them in SalesForce.

Q: How will the results be used?

Similar to the NPS survey, results from the Customer Loyalty survey will be used to provide customer specific satisfaction insight as well as company-wide performance trends. Stakeholders will have visibility and reporting on results as indicated above. During the baseline period, teams should take a proactive approach to all results. Once the process has matured and we have a solid baseline, we anticipate that the metric will be tied to stakeholder performance.

Q: How are we addressing customers that use multiple Mitchell product lines, such as Pharmacy and CSG?

Contacts shared between Mitchell business units will only receive the survey one time per year. As the survey lists are created, any duplicates will be reconciled and will be vetted before any client is contacted.

Q: If I have additional questions, who should I contact?

The following team members can be contacted for additional information:

- APD: Tom Martin
- CSG: Debbi Tillman
- Corp/PS: Shelley Callahan