

# Case Study

**NICE** Satmetrix

**Citation**

## CUSTOMER PROFILE:

B2B professional services firm

## WEBSITE:

<https://www.citation.co.uk/>

## BUSINESS NEEDS:

- Operational efficiency
- Customer satisfaction
- Employee engagement
- Opportunities for coaching

## NICE SOLUTIONS:

NICE Satmetrix

## THE IMPACT:

- 110% increase in overall response rates
- 162% increase in transactional survey response rate
- 24% increase in relationship survey response rate
- 144% increase in online reviews
- Reduction of manual intervention
- Access to real time feedback for all relevant personnel

*“The partnership with NICE Satmetrix enabled us to launch a highly complex voice of the customer programme in a relatively short period of time.”*

– Melanie Johnston, Head of Retention Marketing

# Professional Services Firm Increases Response Rates by 110% Among Other Dramatic Improvements

## About Citation:

Citation helps businesses across the UK take care of their HR, Employment Law and Health & Safety obligations with round-the-clock support and guidance from a team of industry experts.

For over 25 years, Citation has taken care of the messy, complicated bits of running a business, giving over 40,000 organisations valuable peace of mind and freeing up their time to focus on their business ambitions.

## The Challenge

Citation has always prided itself on being a client experience-focused business. The company began actively capturing client feedback to fuel this mission in December 2014. However, employing a variety of different processes, platforms and systems by which to gather the needed data, often further muddied by multiple queries being sent to the same customers, resulted in a less than streamlined effort. This lack of structure left too much room for inaccuracies, created roadblocks to improvements and frustrated stakeholders along the way.

Citation's initial methods had also required manual intervention. For their half-yearly and onboarding survey, employees were responsible for pulling and uploading data from one system to another. And when it came to their Health & Safety and HR visit surveys, management had to completely rely on employees to know precisely when to pull the trigger and manually send them out.

Feedback examination was also fraught with obstacles. Out of the company's four surveys, only responses to their half-yearly survey were sent to Salesforce, providing a limited view of a client's happiness to Citation's Client Relations, Sales, Service and Marketing teams.

And all aspects of survey management from data gathering and sharing to feedback response, resolution, reporting and follow-up rested on the shoulders of just one Citation employee.

## The Solution

After careful review of options offered by a wide variety of vendors, Citation decided NICE's Satmetrix best suited its range of needs. This decision was further cemented by Satmetrix's reputation for client feedback expertise and their having served as co-founders of the Net Promoter Score.

Satmetrix also provided the best value by offering a self-serve platform that allowed Citation to automate its existing processes and give visibility to relevant departments along with a superior reporting functionality.

### Aiming High

The Satmetrix support and implementation teams enabled Citation to set their complex feedback program in just four months. Within this timeframe, they created one relationship survey and five transactional surveys within Satmetrix's online platform, NPX.

While Citation had been advised that this was an unusually high bar to set as typically companies deploy only one survey at a time, their go-big-or-go-home thinking was embraced by the Satmetrix implementation team. Thorough training took place via individual in-person and online group sessions which included discussions on the program's goals, triggers for sends, survey content and ownership for closing the loop.

Salesforce integration was the next step, via combined support from Citation's Salesforce team and the Satmetrix team. Intense user acceptance testing was then carried out to make sure the combined process was working. This was followed by communication across the business to inform everyone through a series of physical meetings and webinars about the changes being made.

In embarking on their new voice of the customer program, Citation intended to revolutionize their best practices. Among the specific expectations of the program were:

- Increased response rates
- Automation and increased technology capacity
- Increased employee engagement and coaching tools
- Improved levels of accountability
- Enhanced dashboards and reporting in a single system
- Broadened single customer view and sharing of feedback in real time
- Increased brand consistency
- Linking of NPS to financial performance

## Quick and Steady Wins the Race

Citation's ambitious efforts were rewarded mightily with the following results\*:

- Improved response rates across all surveys, with an increase of 162% for the transactional and 24% for the relationship surveys, resulting in an overall increase of 110% in comparison to their previous feedback program.
- Fully automated surveys generated from Salesforce by various triggers.
- Purpose-built and comprehensive software delivered in the cloud can be accessed anywhere. All relevant stakeholders have access to dashboards.
- Increased number of online reviews by 144%, which has boosted online presence and attracted even more clients.
- Enhanced employee engagement via access to dashboards where employees can see their scores, feedback, and response rates, and ultimately understand how they play a role in client experience
- Opportunities for coaching via feedback notifications and dashboards. Quality checks and quarterly reviews are provided to those that need a help to improve their performance.
- From having just one employee manage surveys, there are now 15 alert owners and 141 NPX users overall. Feedback is shared on a wider basis and action is taken across the wider business, not only on an individual but also operational level.
- Client feedback in one place. Relevant stakeholders can see individual responses in real time.
- Using the NPX platform, the company had been able to keep the look and feel of all its surveys consistent by uploading banners that follow brand guidelines. Using only one system has also helped with brand consistency.
- NPS is now linked to financial performance. Dashboards are filtered by our client segmentation. Feedback goes to Salesforce enabling more in-depth reporting and provides us with guidance on prioritizing future actions.

*\*Please note that results are based on results compared 2016/2017.*

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