The Voice of the Customer (VOC) Project

Kaye Stambaugh
Vice President, Customer Care

Sheri G. Espinoza
Director, Customer Care

Ayesha Basheer
Manager, Quality Leader

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Formally, Home Depot Supply, HD Supply is the market leader in wholesale distribution of maintenance products to the multi-family customer segment. Distributing over 18K products to over 22K customers nationwide and also in Canada.

**Key features of Our Business**

Next-day delivery
One-stop shop for more than 18,000 products
In-stock guarantee
Dedicated fleet of delivery trucks
Extensive field sales and national account team
Product technical support and special orders
Fabrication and renovation services
Training programs
Customer advocate center
Online solutions
Rapid growth and change over years, left a void in the personalized touch aspect of the business. **The business wanted to streamline the process of decision making and drive back customer centricity. Therefore, a Voice of the Customer (VOC) project was born as a DESIGN project.**

The project was developed using Six Sigma Methodology DMADV

Project Launched In Oct 2006

Project Verified/ Implemented Apr 2007

Since April 2007 VOC has supported business through Integration/ SAP releases or where customer feedback is captured.
The story of the VOC project begins with 3 associates, that extends out to form of a cross-functional business team. The VOC Captain team is made up of six functional areas represented by 20 process owners, 30 VOC Captains, 9 Advocates and 600+ Customer Service Reps (CSRs) spread across 5 locations who touch 600 unique customers each month (via VOC Survey).

The VOC Captains are set in a cross functional matrix, they are Subject Matter Experts/problem solvers representing their respective business functional team. The binding force between these team members is being “Customer Focused”.

VOC’s – Customer Advocate Team – Represented by 8 associates is responsible for, data collection, customer issue resolution and root cause analysis. These associates are the ‘front line’ who talk to customers everyday about escalated issues, things we are doing well and also areas that the business can be doing better.
In the first section, we will discuss the initiation of the Voice of the Customer project, the project methodology used and its relevant importance to the business.
For the VOC Project, the standardized Design for Six Sigma (DFSS) methodology was used. This is a 6sigma methodology that can be used for the development of products/services from the basis of customer requirements it uses several sequential tools for the development of robust products/services.

The DFSS methodology relies on a heavy focus on the Type 1: Customer Quality - The features that customers want.

It is also used when there is lack of existing process or the current process does not support measurement.
1A.a By conducting a SIPOC, deficiencies were identified. The analysis of the current state, existing reports and infrastructure provided insight on various input and output to customer experience. The existing data/quality tools were not adequate in determining customer loyalty and taking action on areas of improvement. Here are some examples:

**Perfect Order Survey.** Analyzing the quantitative data of Customer Satisfaction from Perfect Order survey provided answers to the question “was your last order perfect?” Yes or No. It did not have clear drill down data to answer questions if “No”. Why, where, when, what etc.

If the customer complained about a service or requested resolution it was handled by third tier Customer Service Rep. support. **The information that was logged had several deficiencies.** The Field Sales Reps. did not support the process and content had serious quality issues.

Generic reports were produced to disseminate the information limited to high level distribution and mostly it did not make its way to the process owner.

**The Customer Concession report,** which had 4000 data points, also confirmed a gap in driving actionable reporting and identifying process improvement opportunities. Although data points were collected, they were not organized in a fashion that would drive action from the report given. Therefore, the business had a Customer Concession report that was not used to drive action.

**Anecdotal Data.** The subjective/qualitative data – collected through interviews with process owners to either develop SIPOC and map out AS- IS process maps also showed majority of the projects were run without assessing the impact on the customer. As a result there were constant corrective actions. For example, a corrective action in Merchandising impacted the normal operations of sales team and the end result was customer was confused or

<table>
<thead>
<tr>
<th>Data/Quality Tool</th>
<th>How it was Used</th>
<th>Why it was used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perfect Order Survey</td>
<td>Analyze customer satisfaction</td>
<td>Baseline Customer Satisfaction/Loyalty</td>
</tr>
<tr>
<td>Concession Reports</td>
<td>Analyze concessions given for service failures</td>
<td>Assess financial impact of poor service</td>
</tr>
<tr>
<td>Anecdotal Data</td>
<td>Identify active hot issues in the field</td>
<td>Provide Solutions to customer complaints</td>
</tr>
</tbody>
</table>

Select tools and data illustrate the lack of data depository...
1A.b. The data analysis confirmed lack of a holistic approach to drive continuous improvements. The Functional silos limited the focus on customer centricity. The information gathered from customer touch points was either irrelevant or not in a ready to use form. There was a need for a cohesive force that would bind customer feedback to customer touch points of the business. This project would drive the Customer Centricity in making business decisions.

In the existing structure, the information gathered from customer touch points was either irrelevant or not in a ready to use form to drive continuous process improvement. Hence the leadership wanted a new approach that would instill the focus on “Customer Experience” and drive continuous process improvements. This project was selected to drive the change and fill this gap.

1A.b. We concluded from the initial assessment that current structure of data collection and reporting was not adequate to support the needs/direction of a customer driven organization. The information that existed did not lead to action.

There was also a need for a cohesive force that would bind customer feedback to customer touch points of the business. This project would drive the Customer Centricity in making business decisions. The data analysis confirmed lack of a holistic approach to drive continuous improvements. The Functional silos also limited the focus on customer centric approach.

Hence the leadership wanted a new approach that would instill the focus on “Customer Experience” and drive continuous process improvements. This project was selected to drive the change and fill this gap.
1A.b. **The project was identified as main platform to identify/ develop process that would capture customer experience and drive improvement.** The team developed the scoring guidelines and it was ranked as one of the highest scoring project. Use of project selection criteria helped in prioritization and allocation of the resources. The ratings were assigned by the Sponsors and key leaders.

Selection Criteria had a scale of 1-5

- **VOC** – Top quartile Supports first level of Critical to Quality (CTQ) attribute
- **VOB** – Project Implementation will results in hard $ savings Revenue Increases and Direct Expense reductions of >$40K
- **VOT** – Project Implementation will results in soft $ savings (cost avoidance, revenue retention, Capacity etc)
- **Feasibility** – Low risk of implementation
- **Leverage** – Project will result in significant Positive Impact on other processes

Since the project score was high supporting a business need and alignment to organizational goals, the VOC Project was selected for immediate execution.
1A.c. In this section an overview of stakeholder involvement in project selection and their association and contribution at the various phases of projects is presented.

The Six Sigma Methodology, ensures that Stakeholders are identified in the Define phase. 
**As the team completed SIPOC Analysis, potential stakeholders were identified.** They were grouped under two sections: Internal and External. As the roles and responsibilities were defined, they were later aligned with respective phase of the project and managed through an active communication plan and tollgates.

**Pre – Define and Define Phase:** Executive leadership – President, Vice Presidents representing all functional areas were actively engaged in the selection and definition of criteria & policy.

Executive leaders representing functional areas spearheaded in spreading the message about the project in the their respective areas. They served as ambassadors of change.

In the later phases of the project other stakeholder participation increased.

Measure/Analyze/ Design/ Verify phases – Process owners and SME were actively engaged for process analysis, brainstorming solution, Multi voting etc

Implement Phase – Customer Facing teams were trained on root cause analysis methodology

**External Stakeholders**

Customer – Selection criteria was established to identify potential candidates to be surveyed. Research Analyst were involved to determine the criteria, Statistically significant sample size, reporting design, regression methodology for CTC assessment

Vendor – Was trained on root cause methodology for conducting survey
1B.a. The project clearly aligns with Performance Measures and support our Company’s Goals and Strategies. **The Customer, Process and Financial strategies are supported by the VOC Project.**

HDS Goals/ Strategies are

• To provide World Class Customer Service
• To be Operationally Excellent
• To Increase Market Share while driving down costs

Our Customer Loyalty project directly supports the organization goals and strategies as each of the performance measures ties up to the company goals and strategies.

**The project directly supports the organization goals and strategies as each of the performance measures ties up to the company goals and strategies.**

These performance measures were also used as baseline measurements to evaluate and validate the effectiveness and results of the project.
1B.b. The project will impact each of the organizational goals.

For the Customer Strategy, an increase in the NPS and decrease in the CII will have a direct and significant impact to our ability to evaluate customer loyalty. The project will produce these customer loyalty scores so we can evaluate how ‘well’ or how ‘much we need to improve’ to capture ‘World Class Customer Service’.

For the Process Strategy, a reduction in service failures and an increase in productivity will directly impact our goal of operational excellence. The project will quantify improvement and productivity efficiencies/deficiencies so that we can best understand where to expend our improvement efforts and where we are excelling in operational execution.

For the Market Growth & Cost Savings strategy, a sales growth indicator and cost savings tracking will directly impact our ability to evaluate whether our efforts in gaining and retaining customer satisfaction/loyalty is actually ‘paying off’ in terms of bottom line and top line financial growth.
1B.c. Degree of impact on each goal, performance measure – Methodology … contd.

The ranking of impact of each goal was evaluated by scoring the effort of change management and the feasibility or likelihood of success. Each area was scored by the project team and functional leaders and then combined to determine the degree of impact. A high score would mean that there would be a high influence on current state while a low score would be a minimal impact to the current state.

<table>
<thead>
<tr>
<th>Effort of Change Management</th>
<th>Feasibility Likelihood of Success</th>
<th>Degree of Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Low</td>
<td>1. Low</td>
<td>1*2 =2 (Low)</td>
</tr>
<tr>
<td>2. Medium</td>
<td>2. Medium</td>
<td>2*2 = 4 (Medium)</td>
</tr>
<tr>
<td>3. High</td>
<td>3. High</td>
<td>2*3 = 6 (High)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3*3 = 9 (High)</td>
</tr>
</tbody>
</table>
1B.c. **Degree of impact** on each goal, performance measure, and/or strategy and how was this determined

<table>
<thead>
<tr>
<th>Customer Process</th>
<th>Score</th>
<th>Degree of Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Class Customer Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase Net Promoter Score (NPS™)</td>
<td>6</td>
<td>Increased Customer Loyalty</td>
</tr>
<tr>
<td>Decrease Customer Issue Index (CII)</td>
<td>6</td>
<td>Decreased customer complaints</td>
</tr>
<tr>
<td>Operational Excellence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reduce Service Failures</td>
<td>9</td>
<td>Reduce Cost of Poor Quality</td>
</tr>
<tr>
<td>Increased Productivity</td>
<td>6</td>
<td>Streamline operations</td>
</tr>
<tr>
<td>Market Growth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Growth</td>
<td>4</td>
<td>Customer Loyalty will result in sales growth.</td>
</tr>
<tr>
<td>Hard &amp; Soft $ Cost Savings</td>
<td>6</td>
<td>Increased quality and productivity will result in savings</td>
</tr>
<tr>
<td>Market/Service offering expansion</td>
<td>2</td>
<td>Capture more market share</td>
</tr>
</tbody>
</table>

For example, as shown above, Operational Excellence had the highest score a product of high effort and higher rate success due to continued focus.
1C.a. In the Define Phase of the Project, a SIPOC (Supplier, Input, Process, Output Customer) was used to capture the high level process. Potential stakeholders (both internal and external) were identified during this exercise. You can notice them in the “Suppliers” and “Customers” columns.

After the SIPOC, detailed process mapping was performed from a partnership of process owners and Subject Matter Experts (SMEs).
1C.a. **Stakeholder involvement in project selection and their association and contribution at the various phases of projects was based on their decision making authority and the role they play during various phase of DMADV**

Since this was a strategic project for the company there were three levels of Stakeholders involved at the different stages of the project life cycle.

**Pre – Define and Define Phase:** Executive leadership – President, Vice Presidents representing all functional areas were actively engaged in the selection and definition of criteria & policy.

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In the later phases of the project other stakeholder participation increased.

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Vendor – Was trained on root cause methodology for conducting survey
Executive Leaders, Functional Leaders and Process Owners had the highest degree of impact as what they would be doing after project implementation differed the most from what they were doing in the current state.
### 1C.c Degree of Impact on Stakeholders and How these were determined

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Score</th>
<th>Type of Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Internal Stakeholders</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive Leaders</td>
<td>9</td>
<td>Use quantitative VOC data to drive decisions</td>
</tr>
<tr>
<td>Functional Leaders; Process owners</td>
<td>9</td>
<td>Sponsor Projects and allocate resources, Responsible for timely resolution of customer issues</td>
</tr>
<tr>
<td>Subject Matter Experts</td>
<td>4</td>
<td>Participation in process Improvement activities</td>
</tr>
<tr>
<td>Customer Facing Teams – Customer Service, Credit, Sales Support</td>
<td>4</td>
<td>Assume additional responsibility of capturing Customer Issues</td>
</tr>
<tr>
<td><strong>External Stakeholders</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vendor</td>
<td>2</td>
<td>Continue to execute outbound calling survey.</td>
</tr>
</tbody>
</table>

Based on the index of effort in Change Management and Feasibility
This Section 2, we will discuss the team’s evaluation of the current Customer satisfaction process and activities.
2A.a In assessing the current Customer satisfaction process and activities, the team used various methods and tools to identify possible root causes/improvement activities. Among these were:

**• Stakeholder Interviews** - We chose a few of the Stakeholders to interview (Ranging from Functional Leaders to Subject Matter Experts). Feedback from these interviews indicated that the current activities that were being used to understand customer satisfaction were not adequate.

**• Assessment of Current Reporting** - The team looked at the reports and data structure that was coming from the Perfect Order Survey and other customer reports and assessed the quality and integrity of the data that came from those reports. The assessment also evaluated whether the current reporting was actionable or even being used by the business.

**• Lean 6sigma SIPOC Process Analysis** - The team performed a high level SIPOC which outlined the Suppliers/Inputs/Process/Outputs/Customers of the current activities. This activity identified many gaps and deficiencies.
2A.b The team used methods and tools and then also performed analysis of those methods/tools to identify possible root causes of deficiencies in the current activities and also outline root causes.

**A Gage R&R Study** was performed to understand the repeatability and reproducibility of the customer data being captured by Surveyors and Customer Service Representatives. This study identified that the data capture of customer feedback was NOT being done in a consistent or diligent way.

**Process Drill Down** - From the high level SIPOC, the team performed a drill down of the activities that were occurring in capturing, reporting and taking action on customer feedback. By analyzing the process steps, the team identified several root causes and areas for improvement.

**Fishbone Diagrams** - The team then developed and analyzed the gaps/deficiencies/root causes using fishbone diagrams. The fishbone structure outlined the results of the team’s assessments and organized them in functional areas.

**These exercises resulted in a listing of possible root causes/improvements.**
2A.c Stakeholders were involved in identifying the possible root causes/improvement opportunities.

- **Functional Leaders** were instrumental in giving feedback of the current process and also recommending areas for improvement. These leaders were users of the data and were very vocal about what was ‘wrong’ with the current Customer data capture activities.

- **6Sigma belts** were essential in evaluating the quality and statistical measurement of the process and the customer satisfaction indexes.

- **Process Owners and Subject Matter Experts** gave tactical input of how the data was being captured and also what the current process was.
2A.c Stakeholders were involved in identifying the possible root causes/improvement opportunities.

- **Executive Leaders** identified areas where they needed concise and quantitative customer information to validate and contribute to decision making.

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- **Process Owners and Subject Matter Experts** gave tactical input of how the data was being captured and also what the current process was.

- **6Sigma belts** were essential in evaluating the quality and statistical measurement of the process and the customer satisfaction indexes.

- The **customer** and **vendors** did not have involvement at this stage of the project.
2B.a After the potential root causes were identified the team did performed more activities to narrow the listing down and to identify “the Critical X’s” (six sigma term) or the final root causes.

• **A process walk of data capture** was conducted. A team member actually sat with a Customer Service Representative (Advocate) to experience how they were capturing customer data. A team member also listened to Surveyor calls to experience how they were capturing customer data.

• The team **Reviewed and Evaluated** the root causes aligning with the Gage R&R that was performed to really understand which root causes were the main drivers.

• The team continually performed the **5 Why’s** when assessing the processes and steps of the current activities.
2B.b The team then used the following questions to confirm the final root causes/improvement opportunities:

**Can system support data capture?**

**Can data entry Associates support entry?**

**Does the current training support data capture?**

**Do we have the infrastructure to support capturing and taking action on customer feedback?**
2B.c The team then validated the final root causes/improvement opportunities by taking the strongest methods/tools used to identify them and re-validate that these were indeed the key drivers for improvement.

The outcome of the **Gage R&R** revealed that there was very **LOW data integrity** in the data capture by Customer Service Representatives and Customer Advocates. Each associate was capturing information differently and interpreting customer feedback inconsistently.

There was not a structured **Root Cause Analysis** that supported the business in customer data capture. **Training did not exist for Customer Service Reps and Customer Advocates on how to determine the ‘root cause’ of customer feedback.** This led to a lack of capture of critical root cause analysis data.

**Interview feedback** that current reporting was ‘not usable’ validated that reporting was a key opportunity for improvement. If the business could not use information from the customer, how could they take action? **A concise and meaningful reporting was needed for Executives and functional leaders.**

**Taking action.** Since reporting was not being used, action was not being taken. **But beyond the reporting, a structure of process to support action needed to be created.**
Now that we have walked through the team’s activities to assess and analyze the Current Customer satisfaction process, in Section 3, we will discuss the activities the team performed to develop and design the new Customer Loyalty program solution.
3A.a To develop the possible solutions to a Customer Loyalty program, the team performed various activities.

The team performed research in form of **Customer Satisfaction Benchmarking**. By reading academic articles/books and assessing various industry company customer programs, the team was able to better understand the approaches that others were taking to understand Customer Loyalty.

The team performed a **System Enhancement Evaluation**. Since unavoidably, system changes would need to be made to support better customer data capture, the team needed to evaluate the feasibility of making changes to Siebel and/or Oracle (current systems).

A **Financial Analysis** was imperative to understand the investment that would be needed along with return that would be associated.

A **Talent Review** was conducted to evaluate whether we currently had the appropriate resources with the skills to execute a Customer Loyalty solution.
3A.b The team took time to perform further analysis based on the methods/tools used previously.

By evaluating customer measurement and industry best practice, the team chose ‘best in breed’ practices that could fit into our business goals and company culture.

The team worked with IT to understand the constraints or flexibility we had in terms of enhancing our current customer data capture systems.

The team analyzed the results of the Cost Benefit Analysis and the Payback period of implementing solutions.

Analyzing the resource capabilities and skill sets needed to implement potential solutions was conducted to evaluate with an Outsource or Insource model would fit the program needs.
3A.c The 3 possible solutions were either to PURCHASE, OUTSOURCE or BUILD a customer loyalty program.

The criteria the team used to select the final solution were based on our company’s ability and human resource capabilities to develop the program ‘in house’. We assessed our own capability to perform a Customer Survey. We assessed if would could create an approach that would cover all customer touch points and then perform deep analysis based on the data that came out of the survey. We also made an assessment of our Process Improvement capabilities. Did we have the talent ‘in house’ and on staff to be able to execute customer driven change to the organization based on survey and customer feedback data capture.

All of these selection criteria’s proved to be favorable which is what drove the final solution: BUILD an Internal Customer Loyalty/Process Improvement Program.
3B.a To finalize solution, the team used a few methods and tools.

**Critical to Quality (CTQ) Evaluation** - The team reviewed the initial specifications to be sure there was a direct mapping to the final solution.

The team conducted a **feasibility assessment** to gauge whether the final solution could actually be implemented from an IT and internal capability standpoint.

The team **assessed the risk** of having an external outsourcer conduct customer assessment. They do not know our business like we do, if they misinterpret customer feedback there is high risk to business decisions.

The team identified key **resources** that would work on the program. This revealed if the company actually had the skill set and resources available for the final solution.
3B.b The analysis the team performed analysis in form of a Quality Assurance plan, IT Capability and ease of implementation, a team vote and an actual determination of the team makeup. By evaluating these factors on each of the potential solutions, the final solution was selected as it ‘passed’ each area.

**Quality Assurance/CTQ Evaluation– New Process Design/Met Requirements.** For final analysis, the team weighed and scored the final solution against specific requirements that were identified during the Define and Measure phases of the project. The team did this to ensure that weights and scores still pointed to the final solution. These requirements supported the new process design.

After a risk analysis, the team deemed that the final solution was low risk to implement.

**IT** performed an evaluation of what would be required to make the needed system enhancements and deemed that they could be done with moderate ease.

A **resource and talent capability** was conducted to determine if we had the resources ‘in house’ to execute the solution and it was determined that resources were available and could be aligned to support the project.
3B.c The following stakeholders were heavily involved in determining the final solution.

**Executive Leadership** - The team briefed the Executives on the pro’s and con’s of each potential solution along with the recommendation of the final solution. The Executives agreed with team recommendation to BUILD an Internal Customer Loyalty/Process Improvement Program

**Functional Leaders and Subject Matter Experts** were key participants in performing the methods/tools and partaking in the team analysis.

The **6sigma Belts** led the execution of the methods/tools and performed all the quantitative analysis on the team.

**The Customer Facing Teams** (Customer Service Reps, Customer Advocates), who are on the ‘front line’ servicing and talking to customers validated the Proof of Concept that was executed.

The **vendor** provided feedback on how the survey was going.

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Stakeholder Involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive leaders</td>
<td>Tollgate review of Analyze phase, final say on solution combinations</td>
</tr>
<tr>
<td>Functional leaders, Process owners</td>
<td>Brainstorming and to be process analysis design, FMEA, check list validation, multi voting process</td>
</tr>
<tr>
<td>Subject Matter Experts</td>
<td>Analysis of new process design, scoring of design against CTQ, modification of concept, multi voting process</td>
</tr>
<tr>
<td>6Sigma Belts</td>
<td>Performed statistical validation and provided recommendations to the team.</td>
</tr>
<tr>
<td>Customer Facing Teams</td>
<td>Validation of proof of concept</td>
</tr>
<tr>
<td>Customer</td>
<td>No direct involvement at this stage</td>
</tr>
<tr>
<td>Vendor</td>
<td>Communication of potential changes to customer survey</td>
</tr>
</tbody>
</table>
3C.a This is an overview of our final solution. A central Data repository for customer feedback collected through multiple channels. Root cause methodology, developed using the Fishbone analysis, that points to cause of failure at process level. A periodic Regression analysis to determine what is most Critical to customer, preview and prioritization of issues. Selection of an appropriate track for execution.
3C.a The final solution was to Build an Internal Customer Loyalty/Process Improvement Program that we call The VOC Program---**The Voice of the Customer Program**

The team used specification requirements that came from the Current Situation Analysis to validate that the program met all project and company needs.
3C.b The new solution has many Intangible and Tangible Benefits to the business which are outlined as.

**Intangible Benefits**
- Improved Customer Experience
- Foster company culture of continuous improvement
- Foster data-based decision making at the middle manager level
- Environment of ‘Customer First’

**Tangible Benefits**
- Increased Customer Loyalty via the Net-Promoter Score (NPS™)
- Decrease in Customer Issue Index (CII) Score
- # of Process Improvement Projects/Activities completed
- Cost Savings $$
3C.c **The team confirmed the concept and the financial benefits were validated.** The voice of the customers and Critical To Customer (CTC) assessment, indicated customers were not pleased when their call were transferred multiple times. An orange belt project was lead to test out all elements of the design. CSR were empowered to handle wide variety of issues and resolve them at first contact.

It set an example in the organization – Team approach in making improvements data collection, analysis, prioritization, execution and control.
We now have a solution, To Build our own Customer Loyalty Program called the VOC Program, chosen and designed to best capture and take action on Customer feedback. In Section 4, we will discuss the steps the team took in implementing and rolling out the new VOC Program.
4A.a The following stakeholders were heavily involved in the implementation of the project

**Executive Leaders** - The team briefed Executives on the implementation plan, and risk mitigation plan

**Functional Leaders and Subject Matter experts** were engaged in committing resources, time line of go-live, or preparing the content for training.

**Vendor** was involved to train their associates on using questionnaire and coding customer issues on new survey.

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</tr>
<tr>
<td>Functional leaders, Process owners</td>
<td>Planning and development of Implementation plan, approving the resource engagement for training &amp; testing</td>
</tr>
<tr>
<td>Subject Matter Experts</td>
<td>Developing the testing scripts, content for training, system readiness</td>
</tr>
<tr>
<td>6Sigma Belts</td>
<td>Performed statistical validation and provided recommendations to the team.</td>
</tr>
<tr>
<td>Customer Facing Teams</td>
<td>Active engagement in testing and retesting of system, coding customer issues with new Root Cause Methodology</td>
</tr>
<tr>
<td><strong>External</strong></td>
<td></td>
</tr>
<tr>
<td>Customer</td>
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</tr>
<tr>
<td>Vendor</td>
<td>Training on new survey questionnaire and coding of customer issues</td>
</tr>
</tbody>
</table>
4A.b. Stakeholder resistance analysis was done during the define phase and prior to implementation. In this section few examples of resistance faced during launch and implementation is highlighted. Most of it came as normal resistance to change.

Consorted efforts to focus a positive message within the leadership meetings, design session, awareness session and trainings was most effective means of addressing resistance. At times one on one interviews helped in overcoming resistance. While in one situation we had to pilot a concept to collect data and share analytical results for buy -in.
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<tr>
<th>Type</th>
<th>How identified</th>
<th>Addressed</th>
</tr>
</thead>
<tbody>
<tr>
<td>“This is another Change activity”</td>
<td>Initial meetings with Process owners who were not thrilled about impact to their process</td>
<td>Functional Leaders were used to spread positive message and its importance for organization</td>
</tr>
<tr>
<td>“We don’t have time or resources”</td>
<td>Initial working session participation was reluctant</td>
<td>Established a defined time and established a representation of “Captain”</td>
</tr>
<tr>
<td>“Data input into common depository</td>
<td>A training plan was developed for data entry</td>
<td>Shared results of FCR project on the impact of handle time over time</td>
</tr>
<tr>
<td>Will increase handle time”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Defects of my process will be used against my team in a punitive form”</td>
<td>Review of performance metrics, design of actionable reports</td>
<td>Guidelines on usage of reports were communicated top, across and down the organization, Information usage limited to improvement action.</td>
</tr>
</tbody>
</table>
4A.c. All stakeholders were involved early in the project and actively participated through the various phases. They provided feedback on the changes and helped in prioritization and selection of solution options.

They also become the advocates of the approach by being early adopter. The table provides a list how we ensured buy in.

For example Sales team was interested but was not certain that approach will address their issues. We ensured to run a pilot to capture their issues. When the pilot results were compared with the overall customer feedback, their interest and responsiveness continued through all phases.

Another feature that helped us to ensure stakeholder buy in was to establish guidelines & enforce its usage to promote discussion “on customer centricity” and circumvent figure pointing.
4B.a A comprehensive Project Plan was developed and managed through the project life cycle of a Six Sigma project.

Project Plan provided detail activities through DMADV milestone & Tollgate reviews. The team identified and laid out three major waves for implementation. In preparation mode VOC team developed the training Material, application modification, mock report design and training associates etc.

The “Preparation” Phase included the process flows, training documentation, report requirements, system change specifications and communication plans.

In the “Transition” Phase the training of teams was full force. Data entry teams were given additional time to understand and practice root cause analysis.

In the “Testing and Validation” wave, Mock reports were tested, QA on the test data was analyzed, Additional teams were trained on the Root Cause Analysis data capture approach.
4B.b Several System field changes and procedures were modified or developed to enable Root cause analysis methodology. To ensure the changes are controlled and QA is maintained change control strategy and QA plan was developed and implemented.

The Defect Change Process was designed to ensure continuity of RCA methodology and defect maintenance. As the business processes change, the defects would have to be changed or revised or retired. Therefore it needed a well defined change process with clear accountability. It answered questions like who, when where, how and what. To ensure the change process is followed with consistency simple tools were developed and provided to end users.

Quality Assurance Strategy focused on ensuring the integrity of the dataflow between systems an regular Quality Check of the data entry. CAC team was tasked with the regular QC check. QC log was randomly audited by VOC team to ensure the error rate was within the tolerance range.

A quarterly check of Measurement System Analysis was implemented due to high involvement of CSRs.
4B.c. Creation and Installation of a System for Measuring and Sustaining Results... contd

1. **Customer Loyalty Measurement:**
   - Period/Quarterly/Yearly NPS™ and CII

2. **Customer Feedback:**
   - Top 10 Customer Defects

3. **Process Improvement/Just Do It (JDI) Project tracking**

4. **Hard/Soft $ Cost Savings**

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4B.c. The Measurement System Analysis (MSA) is made up of a few key performance measurements to understand results and sustain results. Among these measurement areas are the following:

- **Net Promoter Score (NPS) and Customer Issue Index (CII)** - These are Customer Satisfaction/Loyalty indicators. The team monitors these scores periodically/quarterly and also yearly. There are thresholds set for these measurements and these are also reported with the company and lie on associate performance scorecards.

- **Top 10 Customer Defects** - Customer feedback is captured and service failure data capture is translated into process defects. These defects are tracked and reported to the functional/process owner for resolution and action. The VOC Team tracks to see if these defects are rising or falling and the affect on the customer and the business.

- **Process Improvement/JDI Project Tracking** - By looking at the defects and then translating those defects into action, a process improvement project is usually initiated. These projects/JDIs are tracked to understand the action that is being taken from customer feedback.

- **Hard/Soft$ Cost Savings** - Once the corrective action is taken a financial analysis is conducted to assess and understand whether there was a financial savings that resulted from the improvement. Many times there is an operational efficiency savings, “soft$ saving” that is realized from the improvement. Other times, there is a bottom line “hard $ saving” from the improvement. The VOC Team tracks this financial savings.

These 4 measurement system areas are used to quantify project sustainability, understand customer feedback and assess project results.
4B.c. Four new measures were created that would track customer loyalty scores and improvement activities.

The results are stored in an architecture that is open. The Data is standardized, reliable and consistently produced on a defined frequency.
4C.a. There were many tangible and intangible results realized from the VOC Project execution. Among these were:

**Increasing our YoY NPS and Decreasing our Customer Issue Index** can be attributed to rigorous customer data analysis, cross-functional teaming and 6sigma/lean process improvement execution.

**Cultural Change.** Previously, the business relied on a ‘gut fee’ or anecdotal information to understand how customers perceived us as a business. Therefore, customer data analysis or evaluation was not conducted prior to making key business decisions. Due to the new project reporting and VOC Captain collaboration, customer data is used to drive actions and decision making.

**Process Improvement.** Per the chart above, process improvement activities have been completed and the process through the VOC Captains are ‘in action’. Prior to the project, process improvement activities were not being actively identified or executed.

**Cost Savings.** While not all improvement activities have a financial $ savings, many do impact our internal processing costs or result in a bottom line impact.
4C.a. As mentioned previously, the key indicators of Customer Loyalty became the NPS and CII scores. This graph depicts a direct tangible result of these scores from 2007 to 2008.

Tangible Results Realized . . . An example:
From 2007 to 2008 the NPS increased by 6% -- An increase in the NPS translates to STRONGER CUSTOMER LOYALTY!
From 2007 to 2008 the CII decreased by 4% -- A decrease in the CII translates to LESS CUSTOMER ISSUES/Defects– STRONGER SERVICE LEVELS!
4c.b The project results directly supported organizations goals and strategies. The approach was well received. Within 1-2 months, it was leveraged to address all customer facing issues of acquisition.

Senior leaders regularly use these as Dashboard indicators to gauge customer loyalty.
4C.c Open architecture and availability of information for all stakeholders was one of the requirement of design. Associates are trained to extract this information from intranet for their use. VOC team also fulfill on demand requests via email. The use of data in non punitive way helped in embracing the free flow of information.
Section 5

Team Management and Project Presentation
5A. The core team members, with niche skills - Lean Six Sigma and Program Management were selected to lead this project. The core team developed and managed the Project Plan. Remaining cross-functional team members were identified in the Define Phase through SIPOC and Stakeholder analysis. The members represented all functional areas of the business. The Selection Criteria were developed considering the key desired features for team performance:

- Ability to multi-task & multi-skill
- Clear & effective communication
- People skills
- Creativity - think out of the box
- Customer Focus

**Roles and Responsibilities** originated from Stakeholder Identification/analysis.

**VOC** Core team tasked with project design and execution/project management

**Functional leaders** – were early adopters of the concept. They were engaged in toll gate, requirement collections and solution selection.

**Process owners** – Knowledge Keepers and Resource owners, key players in mapping out As Is process, brainstorming, customer requirements for the future state, committing resource for the project, Multivoting in selecting solution.

**Process Team members**: Front line associates, process experts, SME, Key contribution in Process mapping, root cause analysis, brainstorming, Solution development. After the implementation these experts were referred as “CAPTAIN”. They were also key partners in ensuring the movement of project within the timeline.

Role definition, alignment of key stakeholders and team members contributions with project phase and proactive notification on time commitment and timely communication were critical in managing a large cross-functional team to effectively focus on the goal.
5B. The core team was responsible to build and effectively lead the cross functional team. Team was briefed on the Project plan, goals and timeline and methodology. The Ground rules for participation, building consensus, roles and responsibilities were developed in partnership.

Team was given an overview of DMADV approach. Team members were trained on select quality tools like the use of Fishbone for Root Cause Analysis, Story boarding, affinity tree for solution design and multi voting etc. Principles of Project Management were also mixed in the training.

The team meetings were run in a structured fashion, use of meeting minutes and action log kept the members involved through the DMADV phases of the project. Design and effective use of communication plan was instrumental in keeping the process transparent. It kept members prepared and engaged in the process. Member participation directly or indirectly in the preparation and presentation of tollgate was another cohesive force.

A back up for each role was also identified in case of non availability of the primary. This helped the team move on the specified timeline. At the start of each meeting beside stating the objective a reference was made to “customer” as a binding force for the team.
In Section 5C, we will give examples of how team managed it performance as effective team

The reinforcement of ground rules, commitment to succeed and timely recognition of associates for over and above efforts were extensively used.

We used milestone completion/tollgates as the team performance metric. Passing of all Tollgates on time was an indicator of the team performance.

Team members had an opportunity to review all the Tollgate documentation prior to the event. They were also debriefed on the take away from tollgate. Some of the action items from tollgate were directly addressed by the extended team members.

Recognizing the efforts of team member for consistency, problem solving for going over and above was a motivating tool. It is recognized and celebrated across the organization.
We continue to drive improvements... with active participation from our "VOC Team"