



2023
**CUSTOMER
EXPERIENCE
TOOLKIT**

 **INTOUCH
INSIGHT**

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Intouch Insight is a CX solutions company, specializing in helping multi-location businesses achieve operational excellence so they can exceed customer expectations, strengthen brand reputation and improve financial performance.

Intouch enables brands to collect and centralize data from multiple customer touchpoints, giving them actionable, real-time insights in an advanced analytics platform. Founded in 1992, Intouch is trusted by over 300 of North America's most-loved brands for their customer experience management, customer survey, mystery shopping, mobile forms, operational and compliance audits, and event marketing automation solutions.

Introduction

CX for multi-location businesses

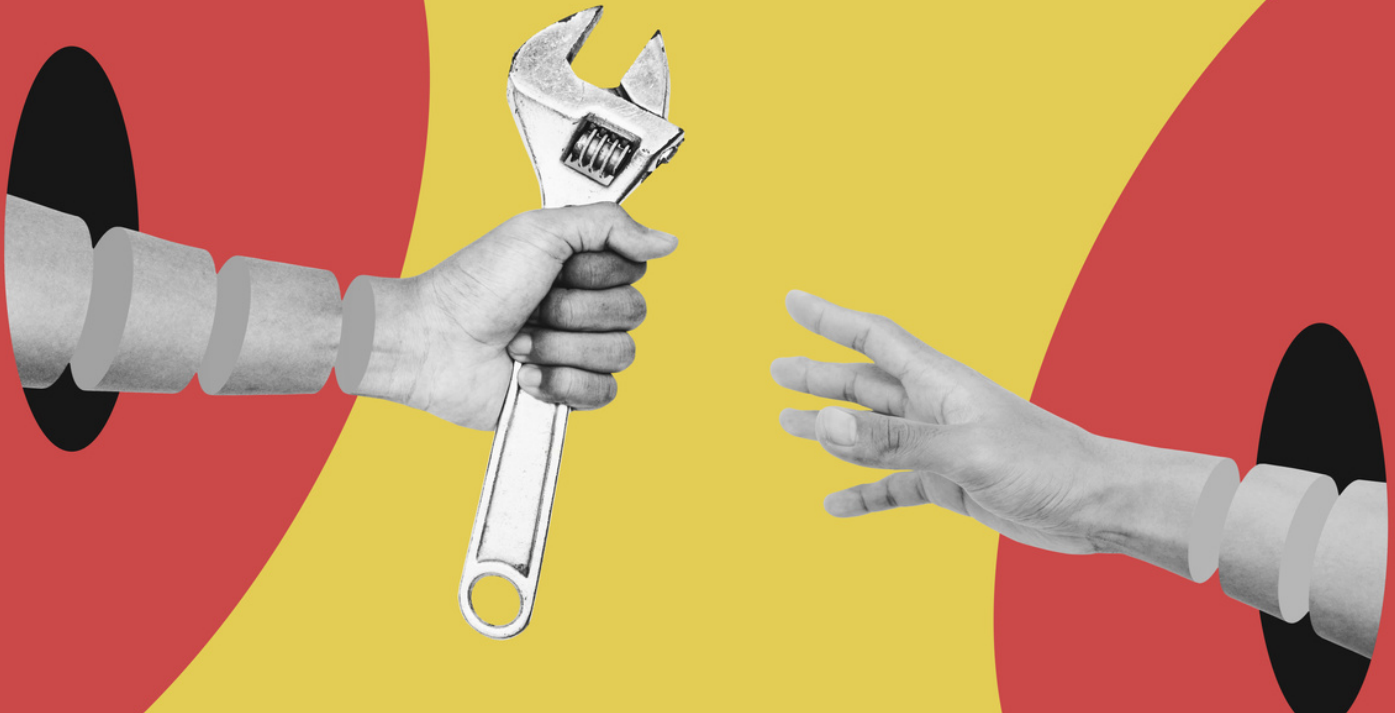
Customer experiences happen — whether you are managing them or not. CX is about knowing the relationship you want with your customers and managing their journey with your brand to achieve it.

For small brands, this is much easier. An owner who operates a single location can know their customers and coach staff to embody the brand's ideals. But as successful brands expand it becomes impossible for the owner to be at every location. As a result, the core brand promises that formed the basis for the brand's success become diluted.



This is where CX becomes an integral part of a brand's long-term sustainability and continued growth. Humans are social creatures who crave connection whether they are purchasing a meal or a new couch. Properly measuring and managing customers' every interaction with your brand from physical locations to digital channels such as mobile ordering is crucial to maintaining a personal connection with consumers.





Why a CX Toolkit?

In a 2022 survey, *Generating Strong Business Outcomes Through Customer Data*, Harvard Business Review found 95% of respondents said being able to keep customer experience consistent across touchpoints is important to their organization. However, only 45% said they are currently able to do so.

This glaring gap is why Intouch Insight has created this Customer Experience (CX) Toolkit. Here we will:

- Explain the core principles that guide Intouch Insight's approach to customer experience management
- Explore some of the crucial measurement tools that form the foundation of a CX program
- Outline a few of the key considerations in order to select the right tools when building your program.

Chapter 1: Guiding CX Principles

The Intouch Insight Approach

For multi-location businesses, customer experience programs involve a multitude of moving parts from diverse team members to various tools. In order to keep these different pieces focused and working together towards the same goal it is important for them to be aligned on the same principles.

Here we will outline three guiding CX principles that form the bedrock of Intouch Insight's approach to customer experience management and that you can use to develop a robust and impactful CX program.



Listen, Interpret, Act



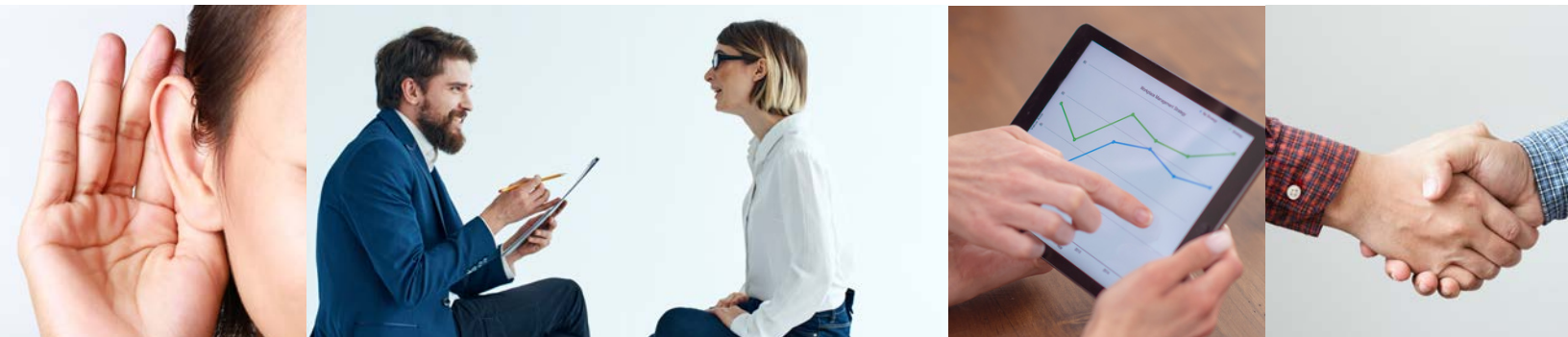
At the core of Intouch Insight's CX philosophy is the cycle of **listen, interpret, act**, and repeat. This means actively engaging customers to understand what they want from your brand, designing standard operating procedures around these needs, and measuring your execution on these standards across all locations.

Data is the fuel that will power your CX program, so everything starts with CX measurement – aka the "listen" stage.

Customer feedback from consumer surveys, measuring your locations' execution across key touchpoints in your customer's journey, and operational data from inspections and daily operating checklists will all be valuable sources of CX data. But raw data is not actionable.

This is why the next step is to consolidate the data collected from your measurement tools into a centralized reporting platform. By unifying all your data you will be able to compare metrics across various channels. This makes it easier to identify trends, narrow down key areas for improvement, and implement informed action.

Continued measurement will then confirm the impact of your actions and help you plan your next move and consistently drive improvements over time.



Track data that drives change

While measurement is the heart of any CX program, it is possible to have too much of a good thing. It is not uncommon for brands to feel that because they **can** measure something, they **should** be.

The problem with this is it can lead to analysis paralysis – when you have so much CX data that you get stuck in the "interpret" stage. The easiest way to avoid this is to focus on measuring data that will drive action. And that is where you are the expert.



No one knows your brand or customer journey better than you do. Why do your customers come to you? What are the defining touchpoints throughout their journey with your brand?

By measuring these key elements via multiple lenses such as customer feedback, operational data, and mystery shopping you will develop an efficient and focused CX program that will drive tangible change over time. And remember, just as consumer habits and expectations are constantly evolving, so will your CX program.



Take a blended approach

Nothing happens in a vacuum — and CX is no exception. When we refer to a blended approach to CX we mean not limiting your program to solely customer data. Surveys, reviews, social media comments, etc are fantastic sources of customer data. However, this is only one lens through which to view your customer's experience.

Objective, operational metrics such as tracking the execution of regular tasks and performing operational audits give you another angle from which to view your brand performance. And mystery shopping provides yet another.

Customer data is inherently biased. Did the customer get stuck in traffic on the way to your store? Were they in a rush to make some other engagement? There are all kinds of factors outside of your control that impact how customers interpret their experience with your brand.



Mystery shopping data is decidedly unbiased. Mystery shoppers experience your brand from the perspective of an everyday customer, but with the sole intention of objectively measuring key points along the customer journey.

Operational audits also provide an unbiased assessment of the execution of brands standards on a location by location basis. By blending and correlating data from these various perspectives you will develop a holistic view of your customer's experience and brand's execution in order to take the most informed actions to improve them.



Chapter 2: CX Measurement Tools

What They Are & How to Use Them

The importance of measurement when it comes to CX cannot be overstated. Data is the lifeblood of any CX program and will fuel improvements over time. The wide array of tools that can be used to collect this data may at first seem overwhelming but actually makes it easier to get started.

CX should not be seen as an all-or-nothing endeavor. While a fully realized program is the end goal for many, it is important not to let current limitations like bandwidth or budget stop you from measuring what you can now. Focus on improvement over perfection.

Instead of an exhaustive list of tools for CX measurement, here we will outline four main tools and the purpose they serve so you can make an educated decision on which ones to invest in today and which can be added in the future.

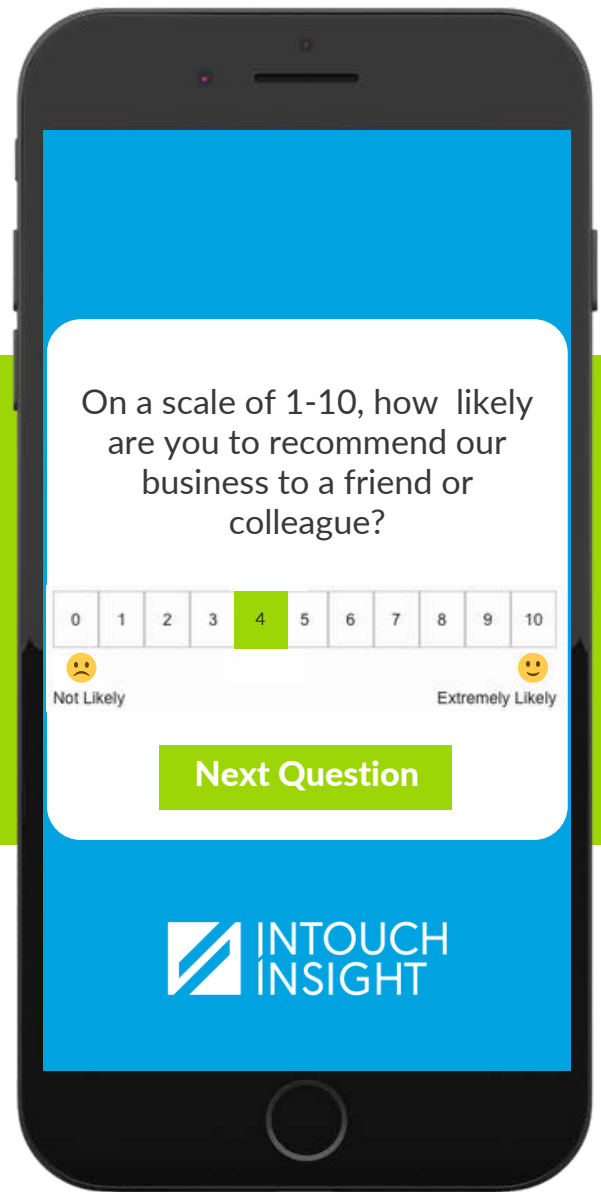


Surveys

Surveys are often the first tool people think of when it comes to customer experience measurement. This is because they are an excellent way to directly solicit feedback from customers. And, since customers are at the core of CX, they are a staple of any program.

Surveys can be used to answer any kind of question you might have. A well-timed post-transaction survey can reveal friction points along a purchase channel. Wondering what rewards will attract more members to your loyalty programs? Survey your customers.

An important thing to remember with surveys is the data collected is highly subjective. The way a customer interprets each interaction with your brand is valid but colored by a multitude of factors that may or may not be within your control. For example, if a customer had to spend 20 minutes walking around your store to find what they were looking for, that is 100% within your control. But, if they were rushed for time or in a bad mood because they had car troubles on the way to your location, that is beyond your ability to control.

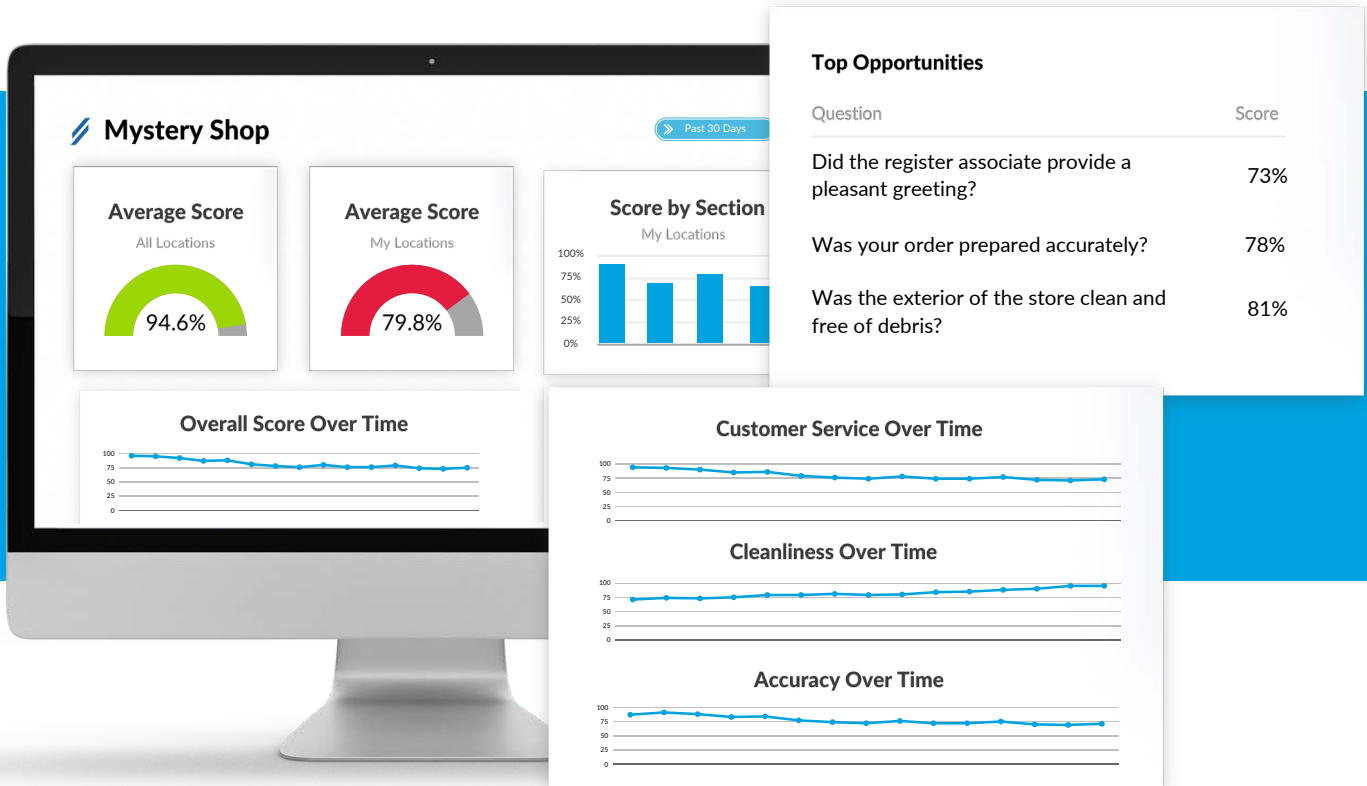


QUICK TIPS

For more information on customer feedback surveys read our [Essential Guide here](#).

Mystery Shopping

While surveys collect subjective feedback, mystery shopping focuses on objective observations. The objective nature of mystery shopping data means brands can use it to validate feedback from consumer surveys – making it a critical component of a well-rounded CX program.



Mystery shopping is when neutral agents enter a location as if they are a regular customer. But in fact, they are making and then documenting key observations. This means their observations will be made from the perspective of an everyday customer but, through professional coaching and rigorous quality assurance on the part of a mystery shopping provider, will not include personal biases.



In order to maintain the appearance of being regular customers, mystery shoppers can only act the way other customers do. This means they can only enter areas accessible to the public and ask questions typical of everyday consumers.

These shoppers will have studied the questionnaire that outlines what to observe before visiting a location. The more you can avoid asking questions that require personal judgment the better. For example, asking “was the cashier friendly?” requires the shopper to determine what is friendly. A better option would be to ask if the cashier acted in the way you know they were trained to. For example, “did the cashier thank you for coming in?”

**QUICK TIPS**

Mystery shopping enables brands to ensure employees are executing their standards.

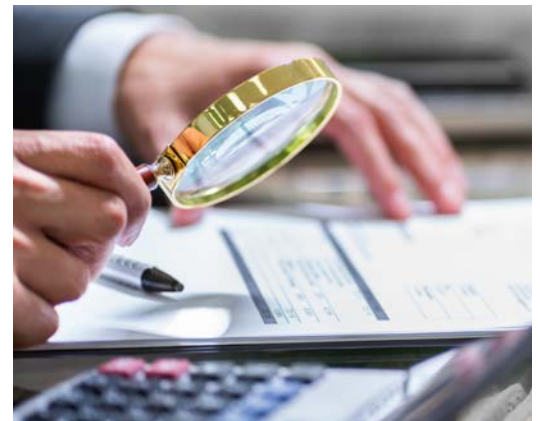
For more information on mystery shopping read our [Essential Guide](#) [here](#).

Operational Audits

Unlike mystery shopping, operational audits are conducted overtly. Staff at a location being audited will either have advanced notice that an auditor will be visiting or the auditor will announce themselves when they arrive. The benefit of this is that auditors can go places and ask questions that mystery shoppers cannot. For example, auditors can enter back rooms, ask questions about inventory, and measure things like temperature gauges in areas that need to be kept at a consistent temperature.



However, this does mean their observations will not be from the perspective of a regular customer. Staff will know who the auditor is and therefore not interact with them as a customer. And, if the location will have advanced notice of the auditor's visit, they likely have prepared their premises accordingly.



Data collected from audits will therefore be more operational in nature but is equally important for your overall CX program. For example, if customer surveys or mystery shopping visits reveal a promotional item is not on the shelves, the last audit of your storage room can reveal if the items were out of stock or improperly organized. Plus, because auditors are known to staff, they can collect photos of any areas that you might want to refer back to later.

Unsure whether to start with mystery shopping or operational audits?
We developed a services recommender to help. Simply answer a few
quick questions for a recommendation.

[Learn More](#)

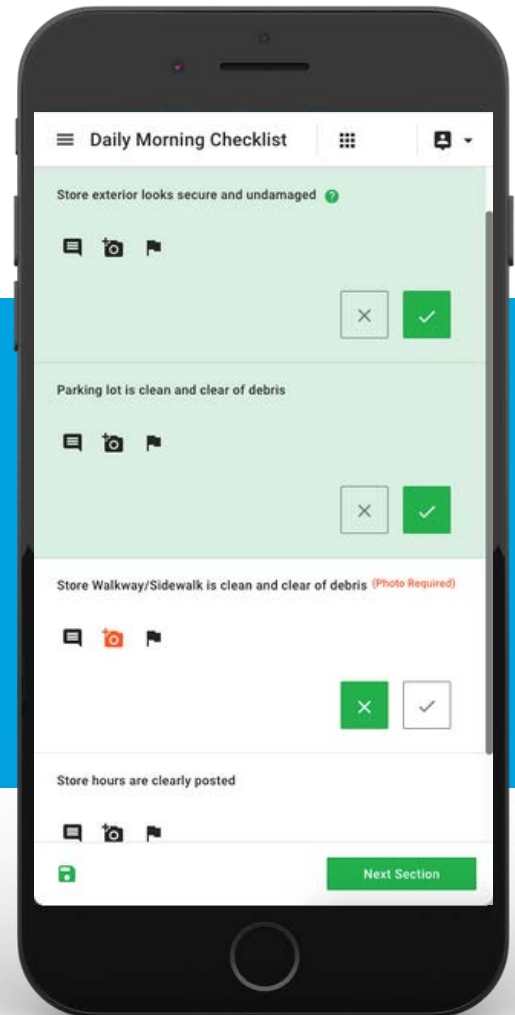


Inspections & Checklists

Another excellent source of operational data is inspections and checklists. Unlike audits which are generally more involved and conducted less frequently, operational checklists can outline weekly or even daily tasks. Inspections and checklists can cover everything from outlining procedures such as correctly setting up a storefront before opening to ensuring all areas of a location are properly maintained.

These allow brands to ensure every location is completing necessary tasks since they require team members to confirm each step was properly completed. With the right tool, you can even require photographs that allow individuals who are not on-location to confirm brand standards are being met.

Using software, instead of old-school paper checklist has the added benefit of being easy to update from anywhere - allowing you to react to changes as fast as possible. For example, if an unexpected storm front will affect some of your locations, you can quickly roll out an additional checklist to all affected locations to ensure they are ready for any kind of weather.



**QUICK
TIPS**

For more information on inspection software read our [Essential Guide here](#).

Chapter 3: CX in Practice

How to Pick the Right Tool

In practice, there is a wide variety of options even within each of the types of tools previously discussed. Where to start and which tool is the right solution for you will depend on your business needs.

Start by asking:

- What do I know about my customers' experience with my brand?
- What am I assuming about my customers' experience with my brand?
- What are the different ways my customers engage with my brand?
- Do I currently have access to customer experience data (eg. comments or reviews on social media) and, if so, how am I tracking this data and where is it kept?

With these questions in mind, here we will explore some key features to look for when selecting the right tools for you.

Selecting a Survey Tool

Multi-location support

Multi-location brands typically require more granular reporting. While feedback can apply brand-wide, when looking to resolve issues or replicate success, it is important to be able to properly segment and drill down into your data.

A survey tool designed for multi-location businesses will therefore enable you to assign tags to locations based on their unique features. For example, if you operate a petro-convenience chain and only some locations have a car-wash, you can use the tag "car-wash" to identify these locations to easily segment results from surveys across your organization.



Better yet, if your survey, mystery shopping, and inspection software is integrated, you can assign the same tags across your measurement tools to quickly sort your CX data and conduct cross-program analysis efficiently and effectively.

Sentiment Analysis

Artificial intelligence and machine learning can help you quickly identify and sort survey responses based on sentiment. This type of feature assigns a sentiment score to open-text answers submitted through your surveys.

Once scored, you can then create a comments dashboard to easily monitor and identify survey responses that require your attention. Tracking sentiment over time and across your various survey programs is an excellent way to monitor the impact of your CX program so you can do more of what's working and less of what isn't.



Contact Management Hub

Survey tools that feature a built-in contact management hub empower you to leverage what you already know about your audience to improve your survey programs. By uploading customers into your survey tool you can easily segment your audience into groups, send out surveys via email or SMS, and make your surveys more relevant.

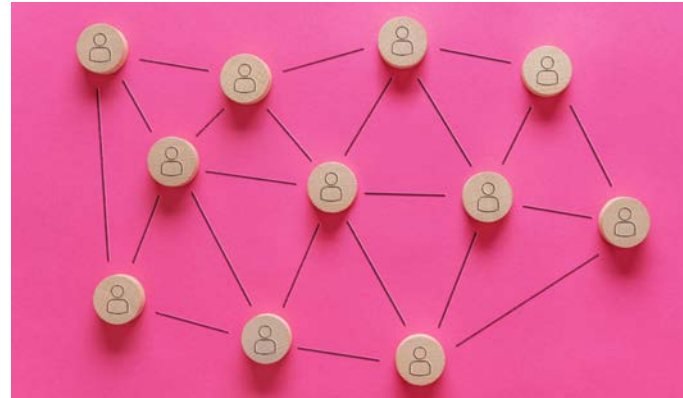


While it might be tempting to send as many surveys out as possible, by ensuring the surveys you send are relevant to the recipients you will not only collect more useful data but also improve your response rate. Some survey tools even come with survey fatigue protection which will automatically suppress contacts that have been included in too many surveys, but for this to work the records need to be maintained within the tool.

When assessing a contact management hub, look for one that has an application programming interface (API). This will allow your customer relationship management (CRM) system to push customer data directly into the survey tool thereby removing the manual work record to add and update records in the contact management hub.

Finding a Mystery Shopping or Audit Services Provider

Here we are combining mystery shopping and operational audit services together because, while the assignment and purpose of the services differ, the management of these services is nearly the same.



Independent Contractor Database

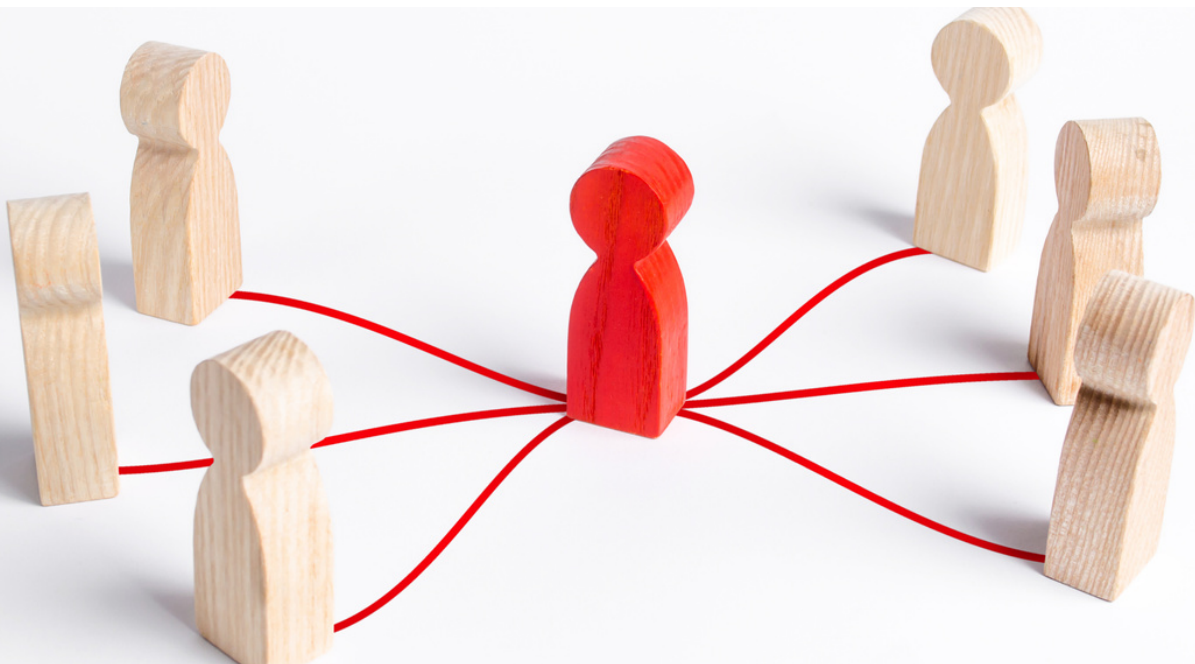
Most companies that offer mystery shopping and operational audit services use independent contractors to assign shoppers and auditors to visit locations and complete the relevant questionnaires. It used to be that these companies would compete around the size of their contractor database.

However, technology today has made it easy for these professionals to work for more than one company – leading to a large overlap between these “independent” databases. Because they’re independent contractors if someone is recruited by a company to be a mystery shopper and enjoys the work that person is likely to sign up with other service providers as well.

While it is very important that the service provider you choose has access to a good database of contractors in order to ensure they are not sending the same shoppers over time, it is less likely to be a major differentiator today than it used to be.

Scheduling

The scheduling of mystery shopping and audit assignments is both the most important and most challenging function of a service provider. Also referred to as “fielding”, the scheduling of a shop or audit is the act of finding a contractor to visit the location, providing them with everything necessary to properly execute the visit, and ultimately ensuring the assignment was successfully completed.



Not having to take on this work yourself is one of the biggest benefits of hiring a professional service provider. It is not uncommon for service providers to leverage a third-party fielding team for some assignments that are difficult to fill, but you should know if your potential service provider is outsourcing most or all this work.

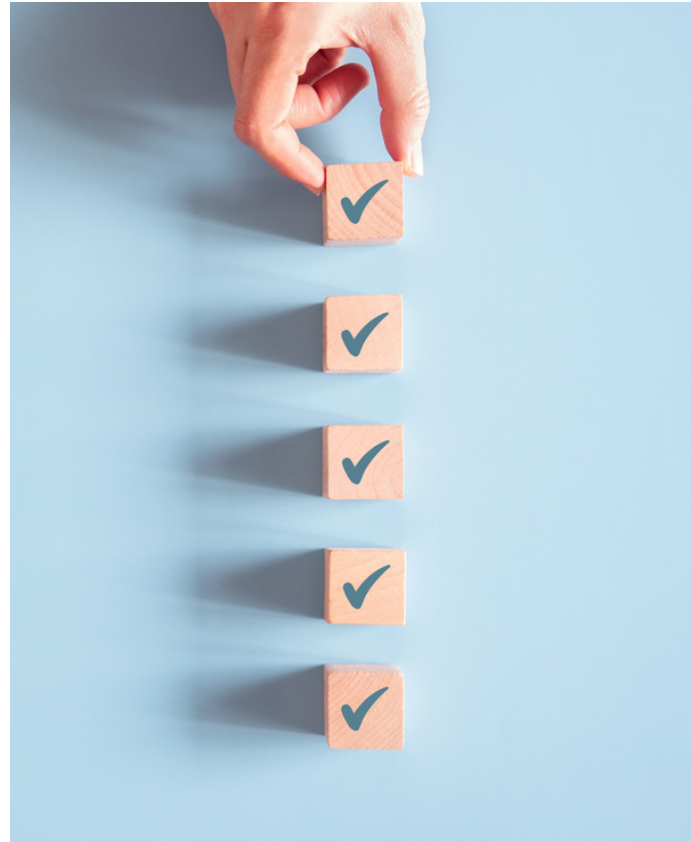
If they are leaning too heavily on third-party assistance, it could be a sign that they are not large enough or resourced effectively to handle your business.



Quality Assurance

A standard, though not universal, practice for service providers is to have field data reviewed before it is provided to their clients. This is important because when managing such a huge number of contractors, not all of them live up to expectations. Good service providers will catch any mistakes and ensure the accuracy of all data while remaining transparent with their customers about any potential concerns in data quality. An ideal partner will value data quality above all else.

While some mistakes may still get through, this QA step should mean these are rare and few. Similar to scheduling, some service providers outsource some or all of this work which could again be another sign that they are not large enough or resourced effectively to handle your business. Additionally, you would need to decide how important it is to you that your service provider has direct control of setting and ensuring their compliance with their own standards.



Choosing Inspection Software

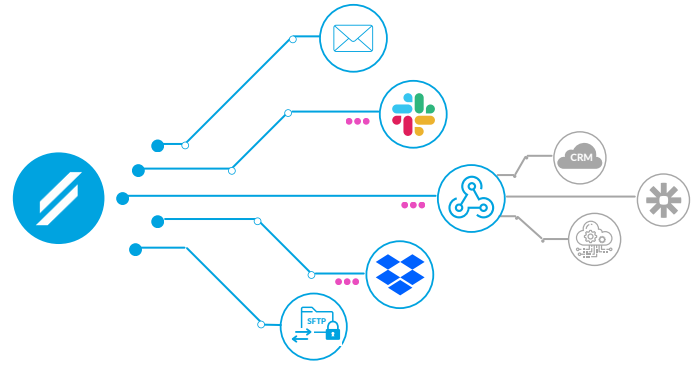
CX Platform Integration

As mentioned previously, inspection and checklist software is particularly useful because it can be both a tool for measurement and action. To truly unlock this potential, look for inspection software that integrates well with a CX platform. This will allow your operational data to flow into the same hub as that of your other measurement tools without any extra manual work.

Curious how your existing CX program stacks up? Our self-assessment tool helps you evaluate the maturity of your existing program in order to identify the best next steps to build off you existing structure.

[Learn More](#)

By having CX and operational data in one hub, you can track operational metrics compared to survey responses and mystery shopping scores to quickly identify areas for improvement. Connecting your inspection software with your CX platform will allow you to automate actions in response to aggregate CX data – saving you manual work and improving response times.



Multi-location Support

One of the challenges facing multi-location businesses is that often not all locations are identical. But inspection software designed for multi-location businesses will provide a simple way to account for diverse locations. Tags can be used to identify locations with similarities in the same way we discussed with survey tools.

These tags can help streamline the management of your forms by dynamically removing steps that aren't relevant to a given location. For example, if you're managing a chain of grocery stores and only some locations have a fresh fish section, you can create and manage one opening checklist for all your locations but have the section pertaining to the fresh fish section only appear for locations with the appropriate tag.

Plus, if you align the tags used in your survey tool and inspection software you will be able to easily pull related data and analyze results from across these tools.



Adopting a CX platform

Dashboards

Based on the old concept of “a picture speaks a thousand words”, data visualizations can be a powerful tool when analyzing the data you’ve collected. Since the primary purpose of a CX platform is to analyze your data, it’s important that the dashboards it provides align with your needs.

CX platforms often come with a number of pre-built dashboards based on what users commonly require. This helps save time both with the initial setup of your analytics and reporting and as your requirements expand and change.

Custom dashboards on the other hand take some manual time to build but can adapt to your unique requirements. By familiarizing yourself with a CX platform’s various dashboard options you can determine whether it will suit your CX program.



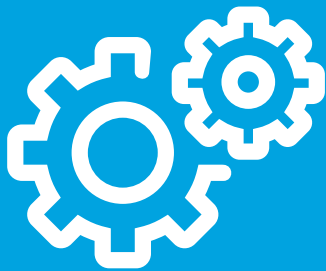
Automation




One of the greatest benefits of advancement in technology has been increased efficiency. The best CX platforms will enable you to automate your desired outcomes – meaning the ability to create preset actions for when specific parameters are met.

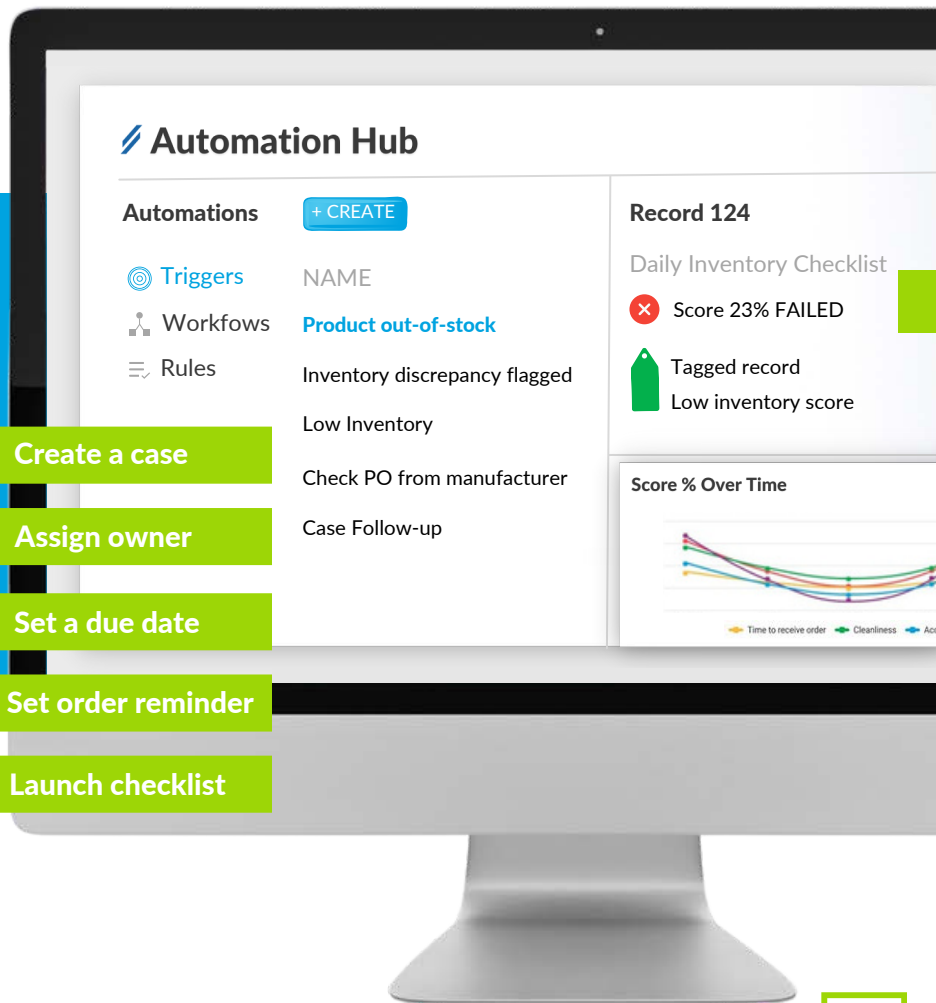
This can be done using features like triggers and workflows. Triggers fire an action based on a single event or data point. For example, if customer feedback contains selected keywords like "flies" or "sick" you can trigger an alert to your food safety team.

Workflows fire an action based on an aggregate of data points. For example, if a location's storage room's average cleanliness score did not meet your standards over a three-month period, schedule an additional cleaning checklist and assign a manager to follow up.

Automation tools are commonly used to help identify consistently high or low performing locations overtime, reinforce good behavior by automating recognition of high performers, or address operational deficiencies by providing feedback to locations that repeatedly underperform.



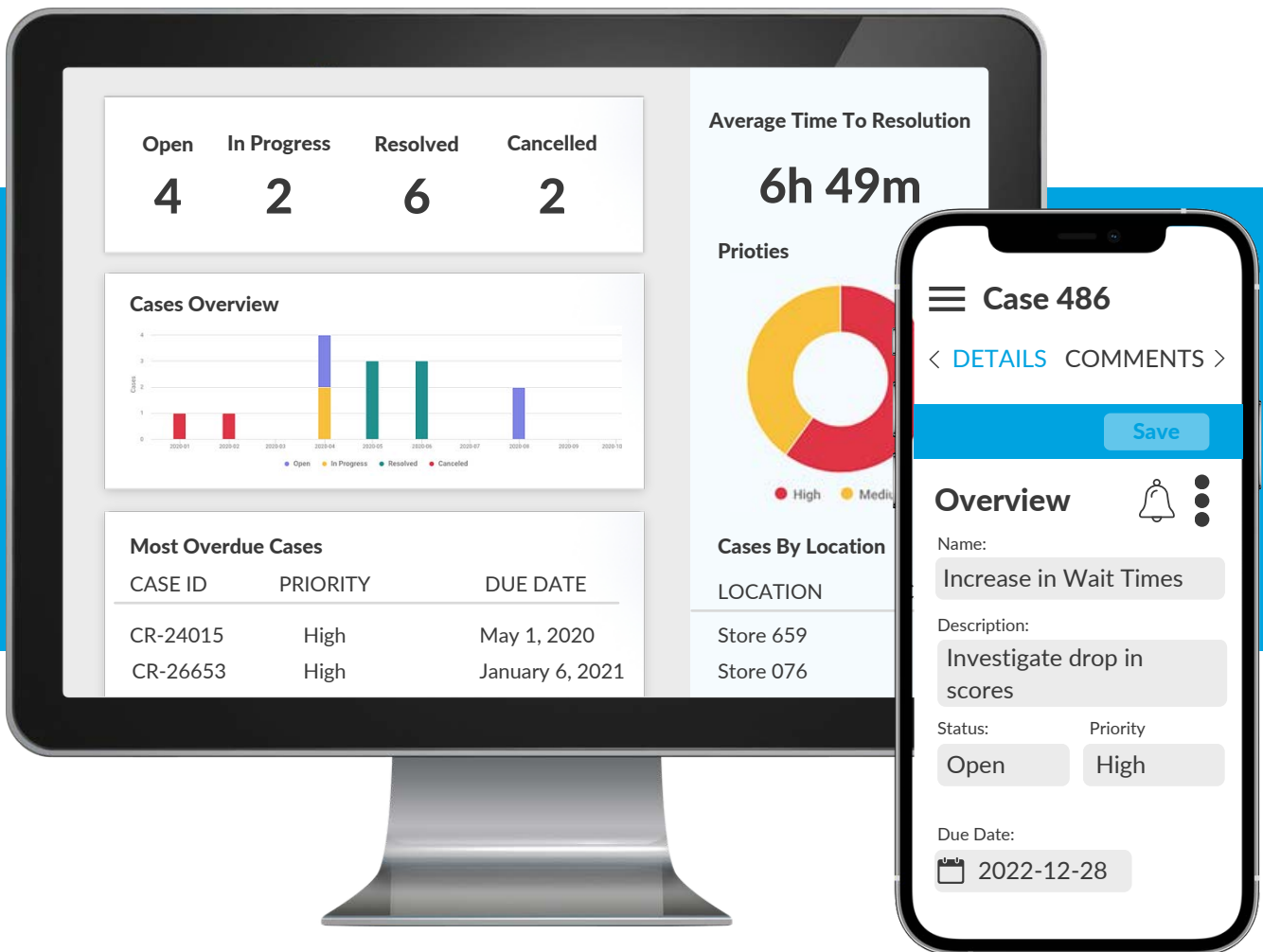
- Step 01 •  Create a case
- Step 02 •  Assign owner
- Step 03 •  Set a due date
- Step 04 •  Set order reminder
- Step 05 •  Launch checklist



Case Management

Cases are a feature used to identify potential concerns that need to be addressed and track them to their conclusion. They automatically notify the right team members and help them collaborate as they take action to resolve it – making them an excellent way to manage a team’s workload.

By looking at all open cases you can easily prioritize them based on scope and impact on your business. They can also serve as historical records to refer to should a similar issue arise again. Cases can be created via automation tools like those mentioned above or manually should you notice a concerning trend using one of your dashboards.

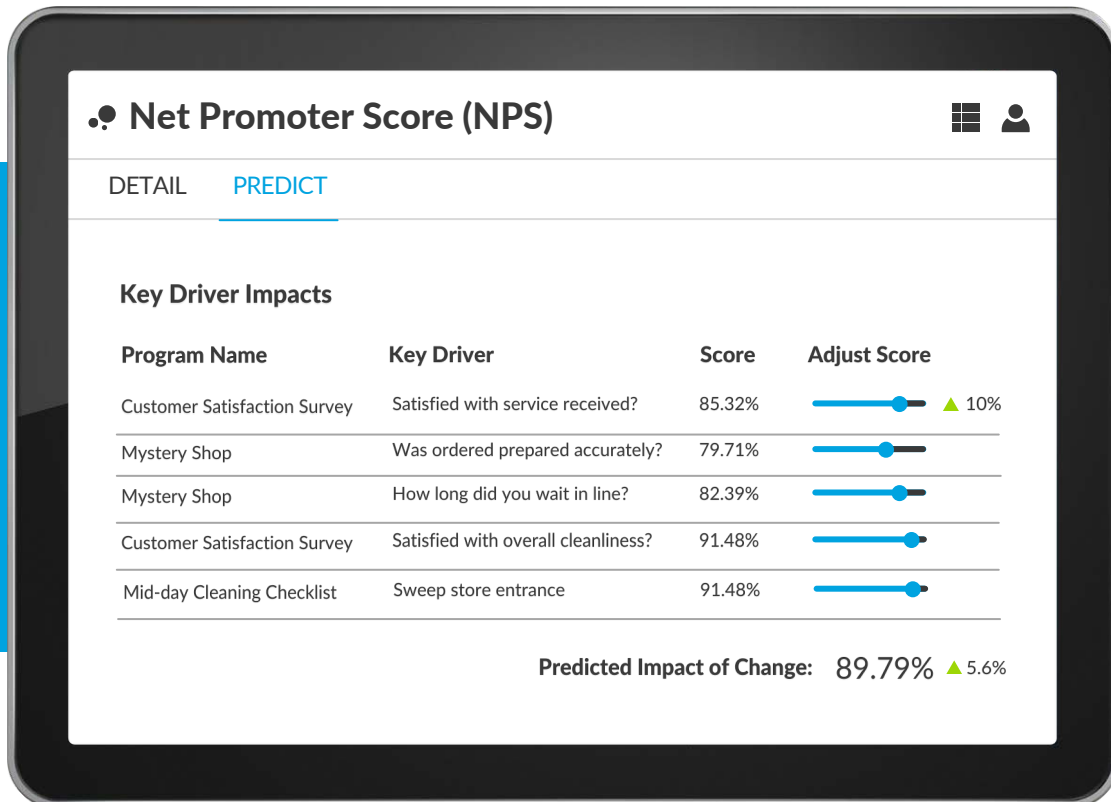


Advanced Analytics

The more advanced CX platforms come with features that allow you to expand what you can do with your data. By choosing a tool that will automatically identify trends, discover anomalies or predict potential impacts of actions, you will be able to amplify the impact of your CX investment with minimal manual effort.

Systems that allow you to automatically enrich your data by adding contextual data, like revenue levels or physical features, will enable you to perform deeper segmentation or seamlessly compare location performance.

Most modern solutions today leverage AI or machine learning to achieve greater impact while saving you time and resources.

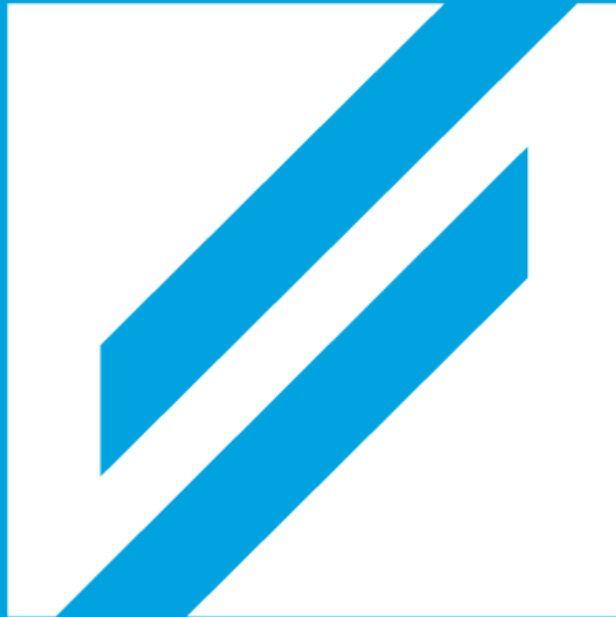


Want to know more? We're here to help!

At Intouch Insight we work with brands across a wide range of industries to help them measure their customer experience and manage ongoing improvements to exceed expectations. **Contact us today to speak with a member of our team!**



**Where execution
exceeds expectations.**



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