



Study Meeting on Customer Satisfaction in Competitive Markets

4–7 October 2005

Taipei, Republic of China

Introduction

With the increased globalization of markets, competition among market players has become more severe. In this competitive market, one of the most important factors is the achievement of customer satisfaction and excellence in service. Although the concept of customer satisfaction in customer-oriented management is not new, the relationship between customers and corporations has been changing almost daily. Customers are becoming the absolute entity for corporations as the final decision makers for business deals and purchases of products.

Peter Drucker, the highly regarded management scholar and writer, stated, “The only valid definition of business purpose is to create a customer.” Successful organizations of the future will be those that can provide goods and services to the customers who want it, where they want it, and in the quantity and at the price they want it, thereby delighting rather than merely satisfying customers. Customer delight will lead to loyalty, which is one of the critical indicators used to measure the success of a marketing strategy. Services cannot, however, be performed without some form of relationship between the producer and the consumer and cannot be stored and retained for later use in the way typical of many tangible goods.

Business corporations make efforts to create and provide their customers with higher value added, which consists of elements such as lower prices, additional benefits, and uniqueness in services. With rapid advances in information and communications technology, corporations can take advantage of the emerging IT systems to create infrastructure within the organization to improve responsiveness to customer needs and to track those needs, thereby improving customer satisfaction significantly. Top management should be aware of how to tap the power of IT to enhance customer services, resulting in better service quality and streamlining of processes.

With advanced technology, competing organizations can rapidly duplicate another organization’s services and products. This process is now accelerated by the Internet and e-mail and can be achieved in much less time than was possible a few years ago. Organizations are also dealing with more highly educated customers who are aware of the varied services and levels of quality available. There is a myriad of options for the customer. However, competitors cannot duplicate another organization’s customer relationships. Therefore customer satisfaction becomes the key ingredient of continued success. Corporations should identify and focus on the key emotional drivers that lead to customer satisfaction, examine the impact of branding, and formulate value-centered strategies leading to service excellence.

The study meeting was aimed at understanding the emerging approaches and methods employed by business corporations in their pursuit of excellence in customer service. The specific objectives were to: 1) share experiences in creative management renovation to achieve greater customer satisfaction; 2) exchange views on systems and structures to deliver quality service; 3) understand the processes for effective policy development in achieving service excellence; and 4) identify successful marketing strategies and service management in business corporations.

The scope of the study meeting covered the following:

- ∞ Customer satisfaction through service quality and service encounters, otherwise known as “moments of truth”;
- ∞ Various measures, structures, and systems in place to ensure greater customer satisfaction;
- ∞ Impact of IT on enhancing customer service, such as the impact of the Internet and mobile phones;
- ∞ Customer relationship management in the marketing promotion, purchasing, and settlement process;
- ∞ Six sigma quality to yield management and customer feedback systems;
- ∞ Processes for effective policy deployment leading to service excellence;
- ∞ Linkages among price, benefit, brand, and other factors in relation to customers;
- ∞ Brand loyalty and the impact of branding strategy on customer satisfaction; and

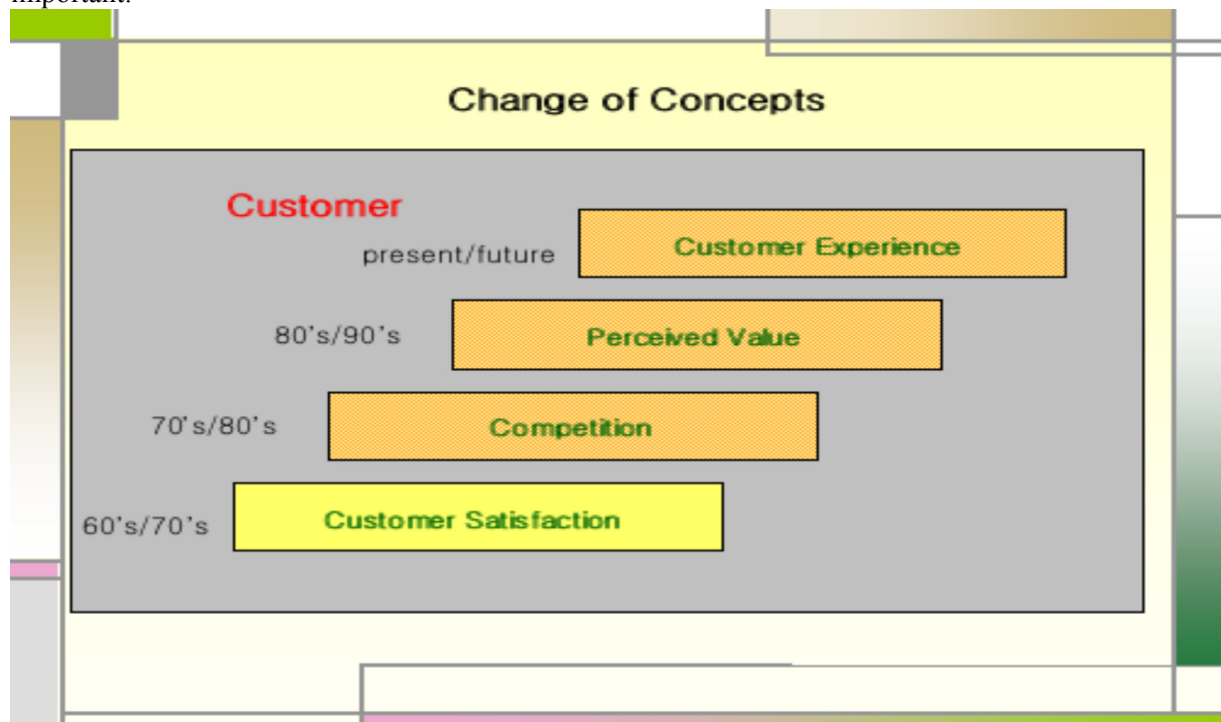
∞ Role of top management in customer relationship management.

The four-day meeting included presentations by resource persons from the ROK, Singapore, Japan and the host country. This was supplemented by country paper presentations, syndicate discussions, and a site visit to Avon Taiwan. The meeting program and list of participants and resource persons are given in Appendix 1 and 2, respectively. Altogether, 14 senior managers of business corporations responsible for planning and implementing customer relationship management, senior NPO consultants, and representatives of the academia from nine member countries participated.

Summary of Issues

Evolving Concept

The concept of customer satisfaction has evolved through the years. In the 1960s and 1970s, the focus was on how to satisfy customer needs. That was when the sellers' market began to end. Competition became fierce and production was no longer linked automatically to sales. The attention of management was not only on customers but also increasingly on competitors. Finding out customers' needs was important but knowing what competitors were planning and doing became even more important.

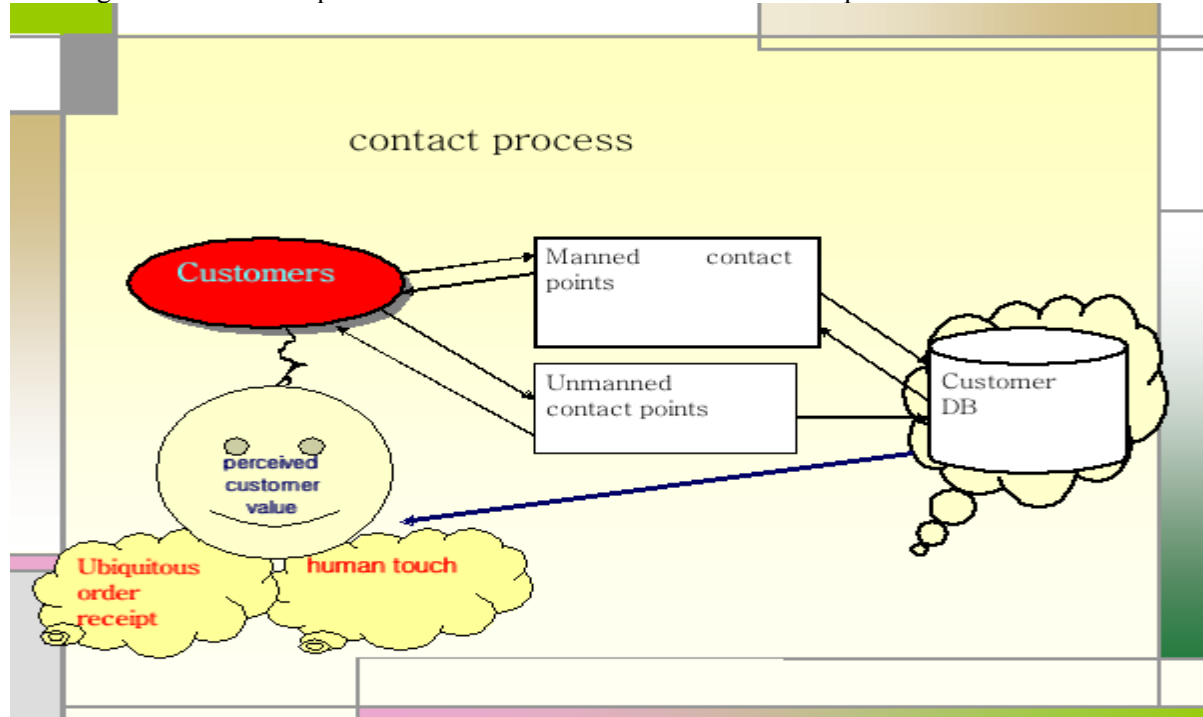


Developing Differentiation Strategies

Entering the 1970s and 1980s, the major agenda of management was how to beat competitors. Even if you were able to satisfy your customers, your competitors might fill customers' needs better and faster at a lower price. That meant that you were no longer competitive. As Michael Porter indicated, corporations needed to develop strategies differentiating themselves from competitors. Differentiation strategies required superior engineering and design capabilities. With development capabilities, corporations could offer distinctive products and services to customers. The efforts of many corporations were concentrated on technologically superb products, and naturally engineers led this drive. As engineers became a driving force in developing new products, technologies and new functions were the starting points. The problem was that when functions and features were added, customers neither noticed nor found value.

Creating Customer Value: Perceived Value and the Use of Information Technology

In the 1990s, many products were technologically superior but had many features that customers did not perceive as value. Enterprises came to focus on value as perceived by customers. The challenge faced by current enterprises is how to offer customers products and services with perceived value. Creating new customer experiences is now an additional task that enterprises must tackle.



The competitive advantage of modern enterprises lies in their ability to create desirable customer experiences continuously. In particular, it is important to create perceived value at contact points with customers.

As the Internet and mobile communication become ubiquitous, not only manned contact points but also unmanned contact points with customers are increasing. Creativity and innovation should be exercised to create pleasant customer experiences in multiple customer contact channels. Some corporations promise customers that wherever customers place an order, they can make the delivery. Those corporations attempt to create customer value through ubiquitous delivery systems. Many corporations are taking innovative approaches to create customer value. Some are attempting to create value by delivering services with a human touch. Mr. Stanley C. Yen, ex-CEO and current Chairman of the Landis Hotel, had every customer request documented to compile his/her preferences. When the same customer visited again, arrangements were made to cater to those preferences. For example, the furniture in a hotel room was rearranged to suite the needs of a garment designer.

Building Customer Databases

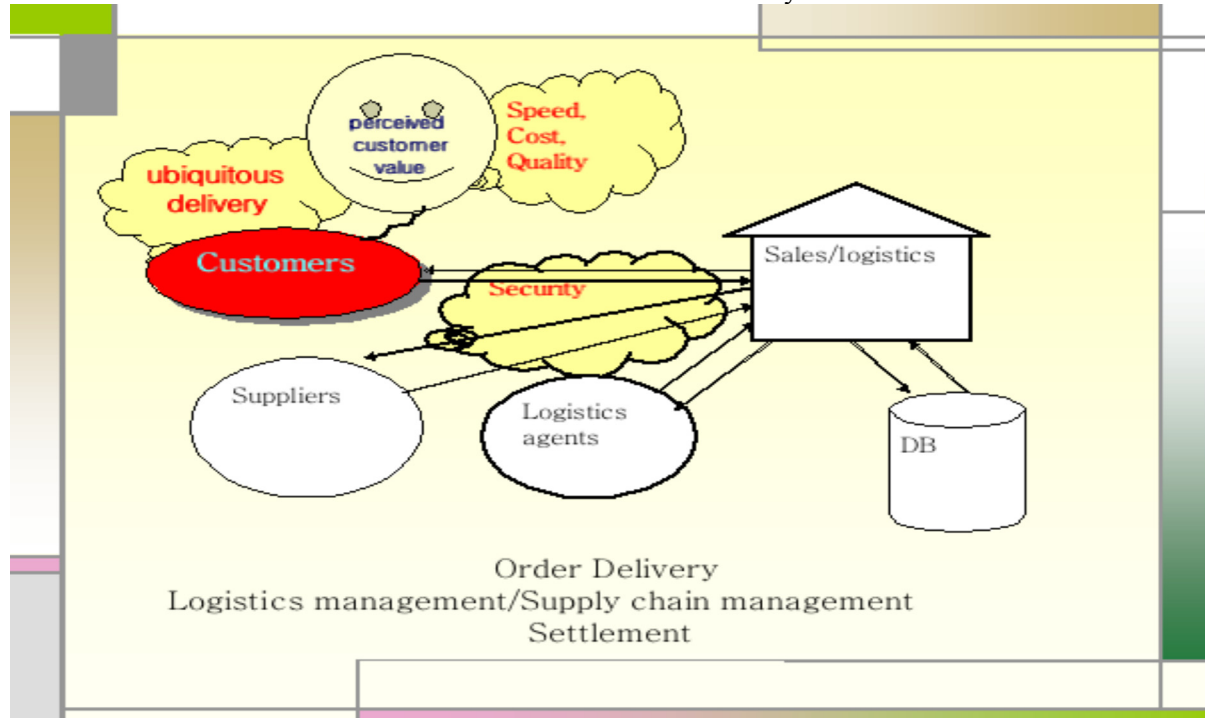
Another new development in customer satisfaction area is building customer databases. Data warehousing is increasingly adopted as a way of meeting the various information needs of top management. Data mining tools are also used to capture trends and/or patterns of purchasing. Some criticize corporations for being overly focused on numbers, asserting that they should focus instead on the customer experience. Despite the criticism, tools tapping the power of IT are being installed on corporate servers.

Customers perceive value when contacts with enterprises are made and also when a delivery is processed. Corporations have long endeavored to improve supply chain management. Better and cheaper products should be delivered faster. Large investments have been made to integrate supply

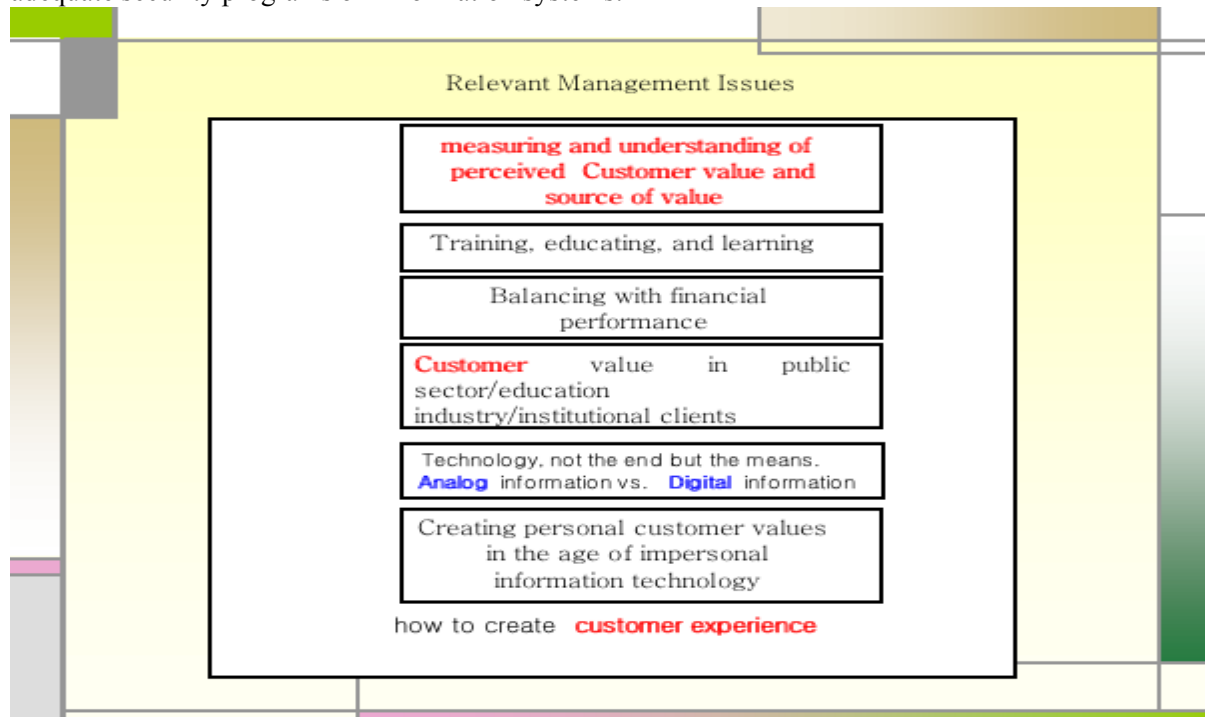
chains and more investment is devoted to acquiring new technologies.

Transaction Security

A new issue in this context is transaction security. As online transactions are



increasing, e-enterprises are struggling to prevent insidious intrusions into their systems. Despite immense progress in security technology, online transaction problems still occur. A common problem is the lack of recognition on the user side. Enterprises need to educate users and management to install adequate security programs on information systems.



Other Issues

A summary of the syndicate discussions (groups 1, 2, and 3) is given in the attachment to this report.

Other pertinent issues presented at the study meeting are recapped below.

- 1) Measurement
 - How can we measure sources of customer value and perception? Measurement will enhance management's understanding of customers, enabling better products and services to be developed utilizing that understanding. Measurement, therefore, is significant and should be carried out by management.
- 2) Training and Education
 - Many have emphasized the importance of training and educating employees in the context of customer satisfaction. However, the most important thing is "learning." Many resources may be expended, but if no learning takes place, those resources have been squandered. The question is not how to teach employees but how to make them learn. The key is communication skills.
- 3) Emphasis on Creating Customer Value instead of Profitability
 - Enterprises are putting themselves in danger of long-term failure by overemphasizing the financial perspective. In a capitalist society, profitability cannot be ignored. However, enterprises should not emphasize short-term profits alone. Top management must recognize that the creation of customer value will lead to profitability.
- 4) Public Sector
 - In several Asian countries, the public sector takes a commanding position in the economy. The public sector should strive to create customer value just as the private sector does.
- 5) IT as a Tool
 - The development of IT may exceed our imagination. Technology, however, is not an end but a means. IT is a tool to create value perceived by customers.
- 6) Customer Relationship Management
 - Customer relationship management will be employed by more enterprises. Customers will also have greater access to more information via mobile phones. It is a challenge for enterprises to create products and services conveying warm personal feelings in the age of "cold" IT. Enterprises should not forget to reach out and touch customers. The experiences of customers cannot always be digitalized or entered into a database. Customer experience, however, remains important as a source of competitive advantage.

Study Meeting on Customer Satisfaction in Competitive Markets

05-RP-GE-STM-30-B

: (4–7 October 2005, Taipei, Republic of China)

Appendix 1

05-RP-GE-STM-30-B: Study Meeting on Customer Satisfaction in Competitive Markets

(4–7 October 2005, Taipei,

List of Participants

Republic of China)

Program

Date Time	4 October (Tuesday)	5 October (Wednesday)	6 October (Thursday)	7 October (Friday)
09:00–10:20	Opening Ceremony (09:50–10:20)	Customer Satisfaction Measurements— A Case Study of CSC Company (Prof. Tai-Hwa Chow)	Improving CS: Japanese Experience (Mr. Hitoshi Seki)	Syndicate Discussion/ Outcome Presentation by Group/ Summing-up and Closing (09:00–11:45)
10:20–10:40	Coffee Break			
10:40–12:00	Customer Satisfaction and Emerging Technologies (Dr. Jisoo Yu)	Service Excellence in Avon Taiwan Customer Service Center (Mr. Tony Lee)	Country Paper Presentation (II)	
12:00–13:00	Lunch Break			CPC Farewell Lunch (12:30–14:00) (An optional tour to Chinese Handicraft Mart)
13:00–14:20	Enhance Your Competitiveness through Customer’s Satisfaction—the Landis Experience (Mr. Stanley C. Yen)	Visit Avon Cosmetics (Taiwan), Ltd. (14:00–15:30)	Customer Satisfaction— The SIA Way (Dr. Buck P. Tang)	
14:20–14:40	Coffee Break		Coffee Break	
14:40–16:00	Country Paper Presentation (I)		Country Paper Presentation (III)	
16:00–17:00	Group Discussion		Group Discussion	
18:00–19:30	APO Welcome Dinner			

Venue: Conference Room at the China Productivity Center

APO Welcome Dinner: Tuesday, 4 October, 18:00–19:30, Ming Garden No. 3, The Ambassador Hotel

CPC Farewell Lunch: Friday, 7 October, 12:30–14:00, Le Louvre, The Howard Plaza Hotel, Taipei

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Total number of Participants = 14

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A Summary of the Syndicate Discussions (Group 1)

Customer Satisfaction (CS) in Competitive Markets

Presentation by Group 1

Facilitator : Prof. Dr.Jisoo Yu

Group Members :

- Ms. Norashekin Yusof (Malaysia)
- Mr Ooi Chee Kong (Singapore)
- Mr.Nattapat Lopraditpong (Thailand)
- Mr.Sadanand Misra (India)
- Mr.Md Mizanur Rahman Talukder (Bangladesh)

Why is CS Important?

- Business build and survive on it
- Organizations exist for no other reason
- Hungry competitors trying to prove it to your customer that you are wrong

Best Practices Frameworks To Begin The Journey

- ISO 9001 QMS
- Excellence Frameworks
 - JQA
 - SQA
 - Service Excellence Class

ISO9001:2000

- Top management shall provide evidence of communicating to the organization the importance of meeting customer requirements (5.1a)
- Top management shall ensure that customer requirements are determined and met in order to enhance customer satisfaction (5.2)
- Inputs to management review shall include information on customer feedback (5.6.2b)

ISO9001:2000

- The organization shall determine and provide the resources needed to enhance customer satisfaction (6.1b)
- The organization shall monitor information relating to customer perception as to whether it meets customer requirements (8.2.1)
- Data analysis shall provide information relating to customer satisfaction (8.4a)

General Themes of Planning for Customer Satisfaction

- Five basic themes can be observed:
 - TOP MANAGEMENT leading the pursuit of customer satisfaction
 - Effective DATA GATHERING
 - ANALYZING DATA to drive actions and decisions
 - Employee Involvements
 - Logistics Management

Top Management Leadership

- Total Customer Experience is the ultimate goal
 - There is no higher achievement than to satisfy the customer whom an organization has committed itself to serving.
 - Revenues and profit are nothing more than the ultimate outcomes of fulfilling customer needs and expectations or perceived values.

Top Management Leadership

- Customer satisfaction is an investment
 - Customer satisfaction processes often generate results in medium or longer term
 - Resources must be applied to understanding customer requirements.

Top Management Leadership

- Everyone must be involved in customer satisfaction
 - All personnel have the capability, at some level, to influence Customer satisfaction
 - Top management must communicate exactly on how everyone can contribute (Strategic Service Intent).

Effective Data Gathering

- Information is everywhere; the challenge is to look for the right kind, from the right source and at the right time
- Customer satisfaction driven
- CRM deployment and leveraging on IT
- Explore websites such as Kakaku.com

Best Practices of Value Creation in CS

- **Indian Bank**
 - Customer Day every 15th of the month
 - All managers to be available to address customer feedbacks
 - Customized Solutions & Services
 - Swarna abharna (Scheme for Working Women)

Best Practices of Value Creation in CS

- **Govt Agencies in Malaysia**
 - Hari Bersama Pelanggan (Customer Day) every once a month
- 7-11 uses IT system to monitor real -time sales of individual items
- IVDP for effective deployment

Best Practices in Customer Segmentation

- FTPI segmenting the clients according to characteristic, need and purchasing power.

Best Practices In Employee Involvement

- Landis Hotel employees are empowered to spend up to USD2000 for service recovery

Customers

- **Who are the customers?**
 - Current customers (internal, purchasing agents, retail dealers, group of end -users)
 - Prospective customers
 - Lost customers
 - Community as a stakeholder

Some Methods Of Data Gathering

- Customer Surveys
- Comments card
- Field reports (sales visit, observations etc)
- Customer complaints
- Customer awards and industry reputation

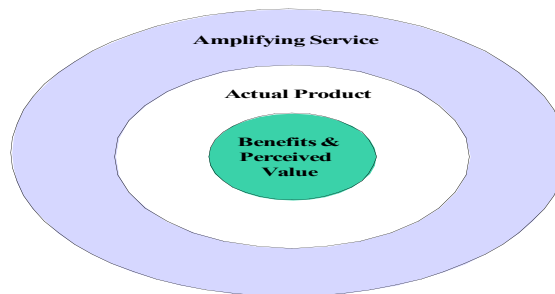
Issues Important To Most Customer

- **Accuracy**
 - Were the order requirements, as stated by the customer met?
- **Performance**
 - Did the product do what it was expected (to fulfill implicit and explicit needs)?
- **Perceived Value**
 - Did the transaction represent a satisfactory cost –to– benefit ratio?

Issues Important To Most Customer

- **Moments of truth**
- **Courteousness**
 - Were personnel representing the organization helpful, polite and emphatic?
- **Knowledge**
 - Did the representative have access to necessary information and were they able to communicate it?
- **Responsiveness**
 - Were personnel able to respond effectively to any problems and/or issues that arose?

Total Customer Service



Total Customer Service - AVON





A Summary of the Syndicate Discussions (Group 2)

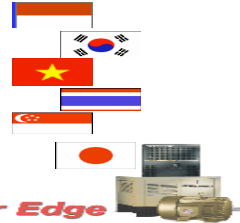
Customer Satisfaction in Competitive Markets

Presentation by Group 2

Facilitator: Mr. Hitoshi Seki (Japan)

Group Members:

- Mr. Juliman (Indonesia)
- Dr. Lee, Sanggun (Republic of Korea)
- Mr. Phan Tien Nguyen (Vietnam)
- Ms. Subyen, Waraporn (Thailand)
- Mr. Tan PengYong (Singapore)



Excellence is our Edge

Definition of Customer Satisfaction

- **Customers** : people or groups of people who purchase or use/consume your products and/or services
- **Satisfaction** : cognitive or affective reaction to overall experience encountered
- **Customer Satisfaction** : customers' positive or negative feeling about the *perceived value* that was received as a result of using your products and/or services in specific use situation



Excellence is our Edge

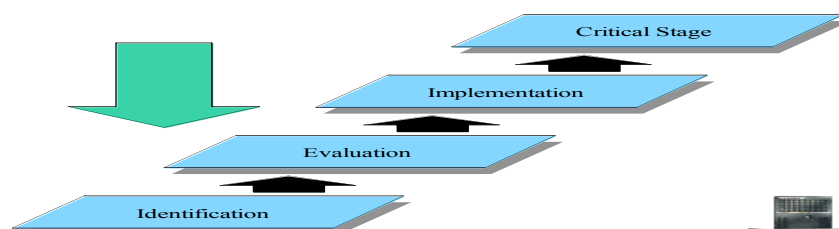
What Did We Learned From the Session?

- Understanding and identifying customers and their wants & needs
- **Measuring customer satisfaction (CS)**
- Developing strategies to fulfill these wants & needs using technologies currently available in the market
- **Utilizing innovations & creations to achieve CS**
- Understanding perceived value, satisfaction & post-purchase behaviors
- Learning from the delegates each member country's challenges in the area of CS



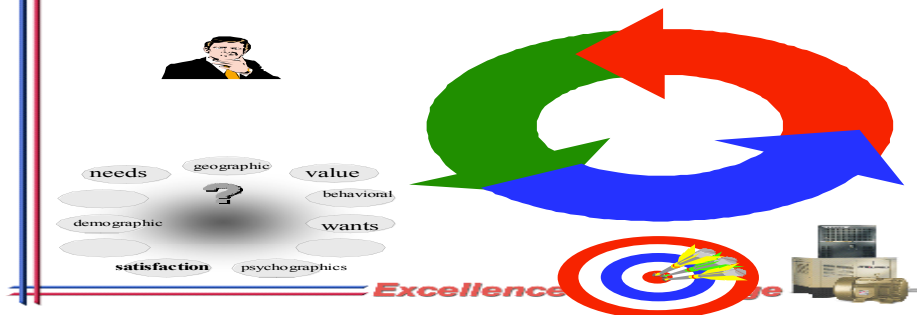
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Methodology for CS Enhancement



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Identification Stage



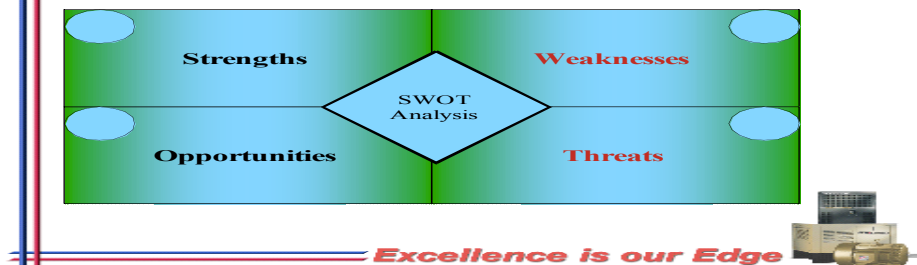
Evaluation Stage 1 : Macro - analysis



Evaluation Stage 2 : Industrial Analysis



Evaluation Stage 3 : SWOT Analysis



Implementation Stage: Strategy Development



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Critical Stage – Core Competency



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Summary



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Best Practices in Member Countries

- Indonesia** : Bio-Farma focused on in-house IT Development & effective use of corporate web-site
- Japan** : Information Value Development Project. Some websites that are convenient to gather customers' opinions. High broadband subscription rates
- Korea** : Samsung's "AnyCall"
- Singapore** : A tripartite effort to drive service excellence at all levels by employers, employees (unions) and government
- Thailand** : VisionTex invested IT and product innovation to achieve CS
- Vietnam** : Launched the use of IT by BaoViet to achieve CS

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Challenges & Future Actions

- **Indonesia** : Improvements of infrastructures and, and optimum utilization of resources to improve CS
- **Japan** : Lack of visible CS benchmark in some industries
- **Korea** : The development of new generation nano-chips and BioTechnology
- **Singapore** : Maintaining its competitive edge through excellent service
- **Thailand** : How to be competitive in the global market
- **Vietnam** : Providing CS to customers before foreign competitors enter the Vietnam market

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Conclusion

- In order to be successful, companies must be alert & flexible to sustain their competitive edge. One of the most powerful concept to be competitive is CS.
- Many companies hardly consider this, and often wonder why they are losing out.
- We are glad that APO is helping member countries to focus on this important tool by organizing this study mission.
- It is now our duty to go back to our respective countries to impart the knowledge we learned.
- Remember: *Excellence is our Edge.*

Excellence is our Edge



Acknowledgements

- Members of Team 2 have contributed ideas enthusiastically to this APO Project
- Team 2 is grateful to our Facilitator, Mr. Hitoshi Seki for his patience, and tolerance of differing viewpoints
- Team 2 wishes to thank Mr. Lee Kia Yoke of APO and Mr. Frank Pai of CPC for all their assistance
- Team 2 wishes to thank all Resource Persons for imparting knowledge on CS to us
- Finally Team 2 wishes to thank all of you for attending our presentation

Excellence is our Edge



A Summary of the Syndicate Discussions (Group 3)

Customer Satisfaction in Competitive Markets

Presentation by Group 3

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- Ms. Namkhair Dolgor (Mongolia)
- Ms. Pandithasekera, S-M D.H.C (Sri Lanka)
- Mr. Mohd. Yazid Bin Jenin (Malaysia)

Best Practices in Customer Satisfaction - Utilizing IT

- **Contacting Customers**
 - ✧ SMS, Telephones, E mails, Fax, Website
- **Call Centers**
 - ✧ One Stop Shop
- **Capturing Customer Data**
 - ✧ Automatic Updating
- **Customer Survey and Measurement Analysis**
- **CRM Packages**
- **Internal Process Management**

Best Practices in Customer Satisfaction - Government Role

- Incentives/ Awards for Quality and Customer Satisfaction Improvements
- Consumer Rights Laws
 - ✧ Consumer Rights Act, Right to Information Act
- Providing Institutional Bases for Awareness
 - ✧ Quality & Productivity Centers, Business Management Education, Standardization, e - Benchmarking
- Citizen's Charters Defining Service Delivery
- Customer Education Programmes
- Bringing in Compulsory Standards
 - ✧ Auto Pollution, Drugs & Pharmaceuticals, Food & Packaging
- Grievances / Ombudsman Mechanisms

Best Practices in Customer Satisfaction - CRM Implementation

- Construction of Time Series in Customer Satisfaction Index
- Customer Database Creation
- Customer Surveys
- Standard Packages/ Solutions
- Capture Data Customer Response using Internet/ Communications Tools.
- CRM Strategy Formulation & Implementation

Best Practices in Customer Satisfaction - Measurement

- Defining Attributes of the Products and Services Leading to Customer Satisfaction
- Correlation Analysis
- Statistical Techniques for Measuring Value to the Customers
- Analysis of Customer Data for Behavior Trends
- Third Party Customer Satisfaction Surveys
- Benchmarking Customer Satisfaction with Competitors and other International Surveys

Best Practices in Customer Satisfaction - Education & Training

- Meetings of Supervisors with Employees
- Employee Conferences with Dealers and Customers
 - ✧ Training Institutes
- Relating Customer Satisfaction Index to Employee Performance
- College Education and Workshops for School Children

Best Practices in Customer Satisfaction - Sales & Marketing

- Empowerment of the First Line for Taking Care of Complaints: Moment of Truth
- Service Quality Benchmarking
 - ✧ Call Centre Employee – Customer Interaction Parameters
- Goods Returned - Exchange or Cash Back
- Direct Selling
 - ✧ Telemarketing, Web Based or other IT Tools and Company Show Rooms
- Loyalty Bonuses for Repurchase
 - ✧ Discounts , Mileages, Points, Cash Backs

Best Practices in Customer Satisfaction - Challenges

- Lack of Awareness / Exposure
- Lack of Knowledge Imparting Institutions / Programmes
- Attitudinal Barriers to Adopt New Concepts
- No Accountability in Monopolistic / Ignorant User Conditions
- Absence of Customer Rights Protection Mechanisms

Best Practices in Customer Satisfaction - Road Ahead

- Training / Education / Awareness Programmes/ Global Exposure
- Incentivization by the Government of Customer Satisfaction Adoption
- Compulsory Standardization
- Creation of Customer Satisfaction Knowledge Institutions for Providing Support Services
- International Co -operation in Spreading Awareness
- The Application of Benchmarking on Customer Satisfaction
- Mystery Survey