

# Business Outcomes- Focused Customer Experience



# The Financial Services Market for Capital Equipment is Changing

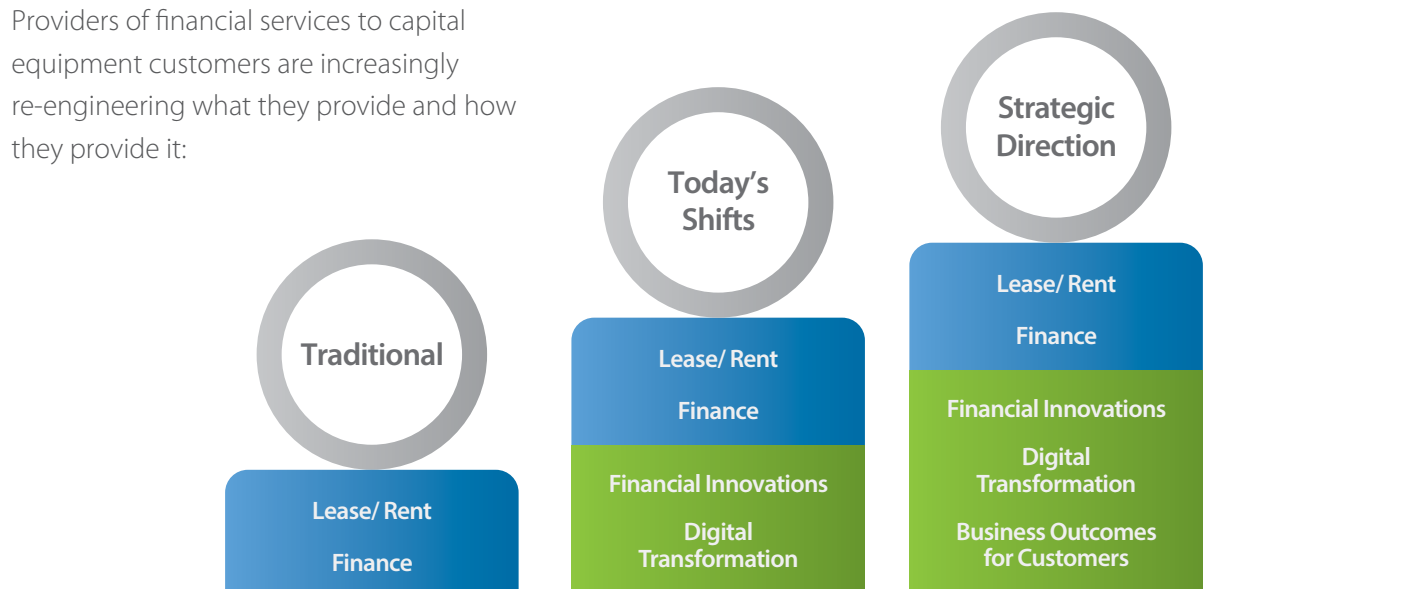
## Customer Shifts

Customers are increasingly wanting a seamless, simple, quick process that supports their need to manage a more complex, dynamic business environment.



## Provider Shifts

Providers of financial services to capital equipment customers are increasingly re-engineering what they provide and how they provide it:



**These shifts present a new business imperative:**

- Innovate financial solutions.
- Help customers achieve their business outcomes.
- Redefine and enhance roles of account representatives.
- Reinvent processes for delivering financial services from cradle to grave.
- Focus on delivering a brand promise that customers value.

## Managing the Customer Experience for Business Impact

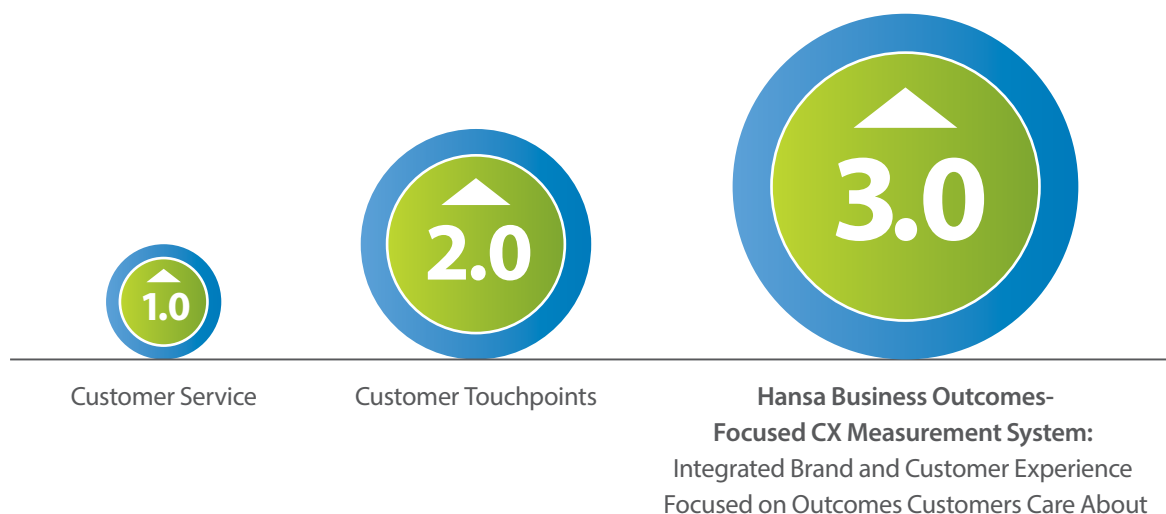
Financial services providers' strategy for their customer experience (CX) must reflect these market shifts. Moreover, traditional approaches to measuring customer

satisfaction with their experience are often deficient in accommodating these shifts.

## Hansa's Business Outcomes-Focused Customer Experience Measurement System

Hansa's system takes CX measurement to a new level of business value. We focus on how well the financial services provider is helping customers with their desired

business outcomes. Our approach also provides direct feedback on how customers experience delivery of the provider's brand promise.



If the CX items Hansa includes in our approach are absent in your surveys, you risk focusing on the wrong improvement priorities. Hansa's approach squarely addresses how our clients help their customers obtain business outcomes, deliver their brand promise, and take the role of their account reps to a new level as business

advisors. The Hansa approach also aligns CX measurement with the provider's innovations on financial solutions, initiatives focused on digital transformation, and the important role emotions play in customer decisions. Some or all of these factors are often missing in customer satisfaction surveys.

## The Customer Experience Factors that Distinguish the Hansa Business Outcomes Approach



The highlighted factors suggest a major shift in our mental models of how we think about and measure the customer experience:

| FROM  |   | TO  |
|---|---|---|
| Internal focus (what we do)                                   | ➡ | External, customer focus (what customers are trying to accomplish)                              |
| Brand delivery not measured                                   | ➡ | Brand promise elements included   |
| Touchpoints   | ➡ | Customer business outcomes in addition to touchpoints   |
| No clarity on how financial services actually help a customer | ➡ | Explicit understanding of how financial services help customers achieve their business outcomes |
| Sales reps as trusted advisors                                | ➡ | Sales reps as trusted business advisors   |



| FROM  |   | TO  |
|---|---|---|
| Functional (cognitive) decision making                | ➔ | Emotional and cognitive decision making   |
| Improvement initiatives unconnected to CX measurement | ➔ | Clarity on expected outcomes from innovative solutions and digital transformation |

Our approach is proven: We have applied it with other financial services providers and delivered significant,

new business insight to inform their CX strategy and improvement initiatives.

## Can Your Organization Benefit from Hansa's Business Outcomes-Focused CX Measurement System? Questions to ask:

1. Does your current customer satisfaction survey include questions about your brand promise?
2. Does your survey include questions about business outcomes and a customer's business priorities?
3. Do you know the ways in which customers see your provision of financial services as supporting the attainment of their business outcomes and priorities?
4. Do you know whether your account reps are providing the type of business advice customers value in their equipment acquisition strategy?
5. Do you know the impact on customer loyalty of helping customers with business outcomes and their investment strategy?
6. Do you know what builds an emotional bond with your customers?
7. Can you measure progress on your improvement initiatives for digital transformation and new financial solutions?

Hansa tailors our approach to measuring the customer experience for each client. We would be pleased to learn more about your CX strategy and discuss how our

approach could be adapted to yield maximum payoff for your organization.



Hansa GCR is a full-service market research and consulting firm. Looking through the lens of the customer experience and applying psychological principles of human motivation, it offers best-in-class services in areas relating to Customer Experience, Brand Solutions, Market Assessment and Segmentation, and Product/Service Innovation.

For further information about Hansa please visit us on the Web at [hansagcr.com](http://hansagcr.com), contact us via email at [services@hansagcr.com](mailto:services@hansagcr.com), or call us at: +1 503.241.8036.