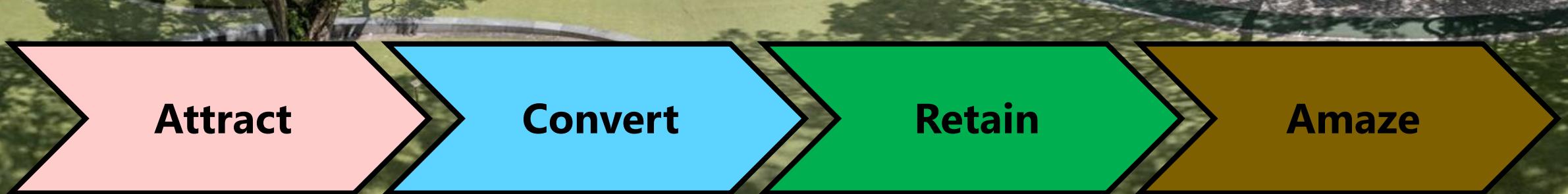




# **Retain: Service**

## **Voice of the Business (VoB)**

**IS446 – Managing Customer Relations with Analytics**



**Attract**

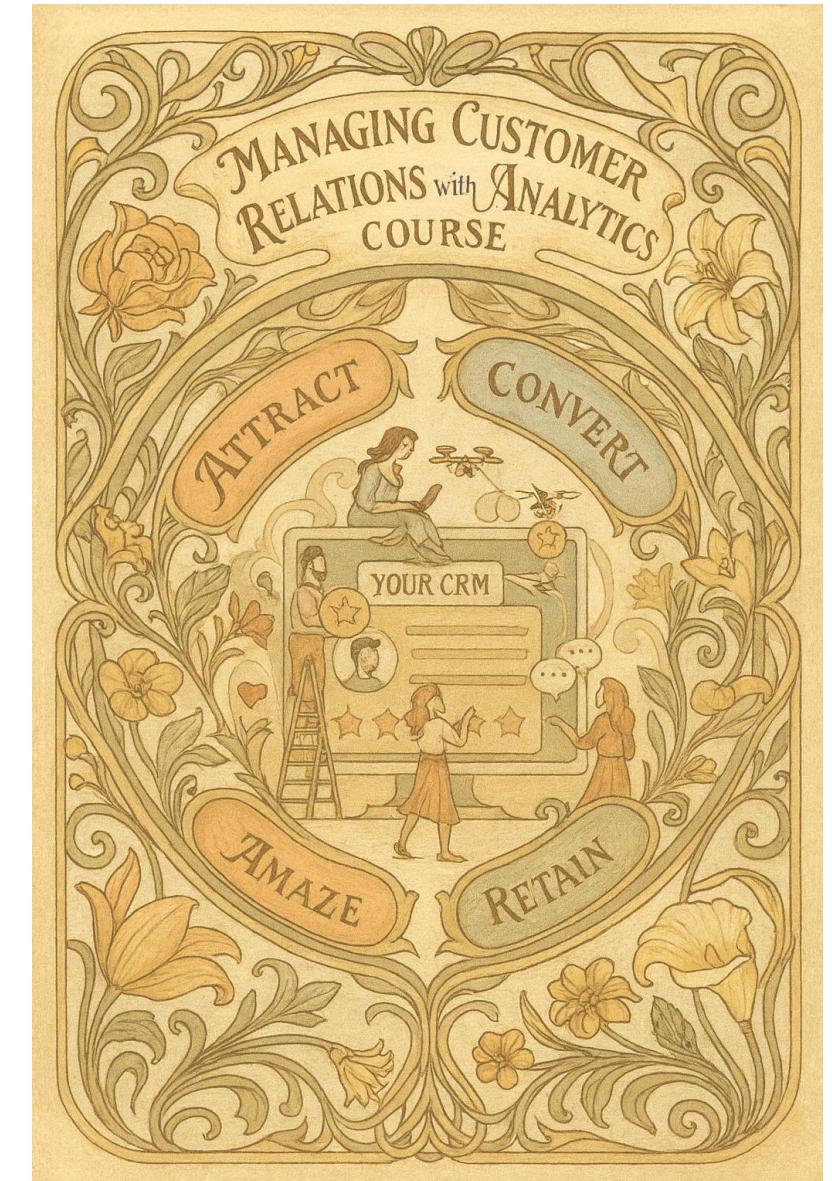
**Convert**

**Retain**

**Amaze**

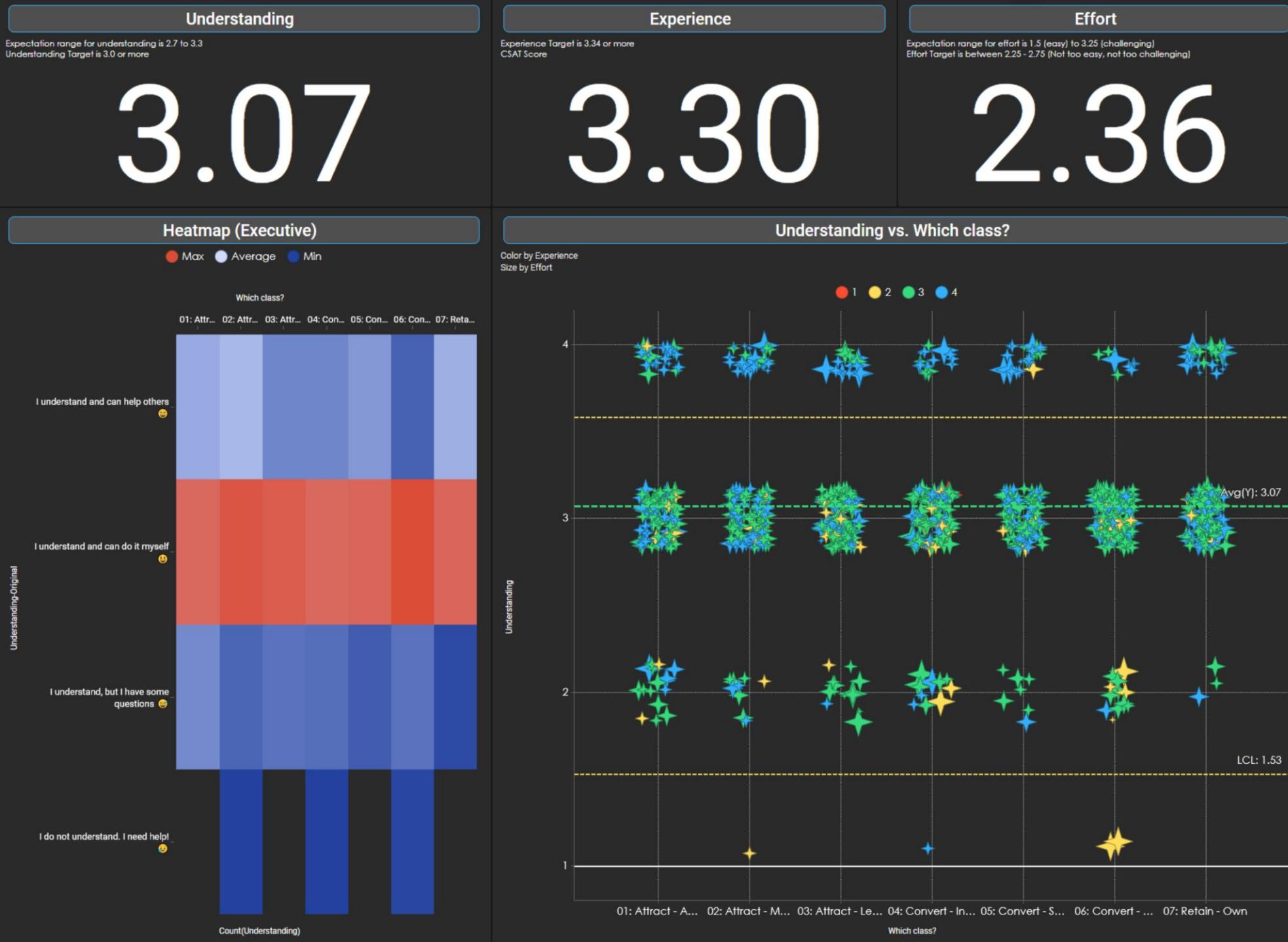
# Agenda

- 
- 01** Review / Wooclap 
- 
- 02** High Quality Service
- 
- 03** Service Models
- 
- 04** Customer Segmentation



# Reflections Dashboard

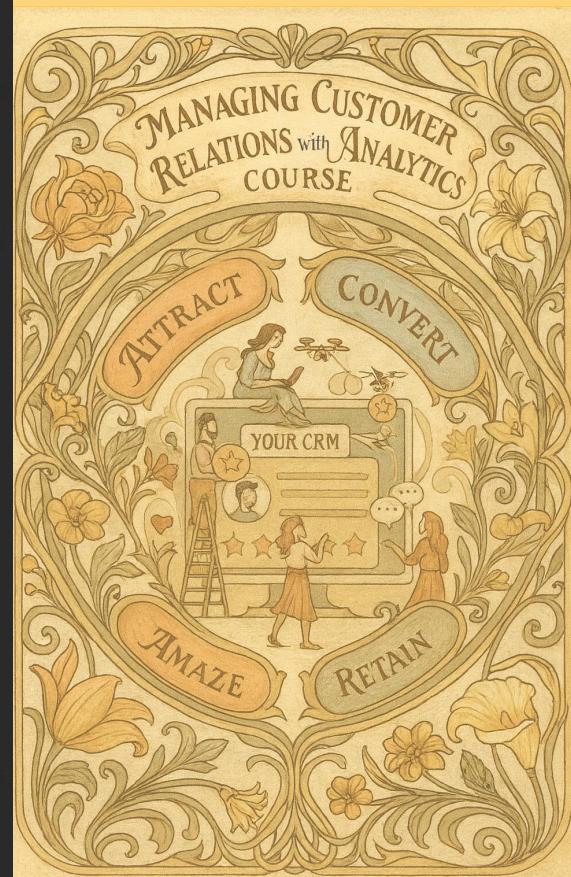




# MCRA Operational Dashboard

**Axis X – Class Topic**  
**Axis Y – Understanding**

Color by **Experience**, Size by **Effort**





## Week 07 – Text Analytics

### 🔍 Key Insights and Learning Outcomes

- **Kano Model:** Students consistently understood the three quality dimensions—Basic, Desired, and Excited—and how they influence customer satisfaction.
- **Apostle Model:** Recognised as a framework for mapping satisfaction against loyalty (e.g., Hostages, Mercenaries, Apostles).
- **CTQ Trees (Critical to Quality):** Students grasped how to translate qualitative customer needs into measurable metrics using Six Sigma.
- **Conceptual Shifts:** Many students moved from a product-centric to a customer-experience-centric mindset. The idea that “perfect is the enemy of good” resonated strongly, with students reflecting on MVPs and balancing quality with timeliness.

### 😊 Overall Experience and Sentiment:

Largely positive and engaged. Students appreciated the practical relevance of the models and the video review activities.

Tone: Reflective, with many linking concepts to personal experiences (e.g., Apple loyalty, airline service expectations).

### 🎉 Top Enjoyable Activities or Topics

Activity/Topic	Mentions
Watching peer videos	30+
Kano Model case studies (e.g., Lobster)	25+
Wooclap quizzes	15+
CTQ Tree construction	10+

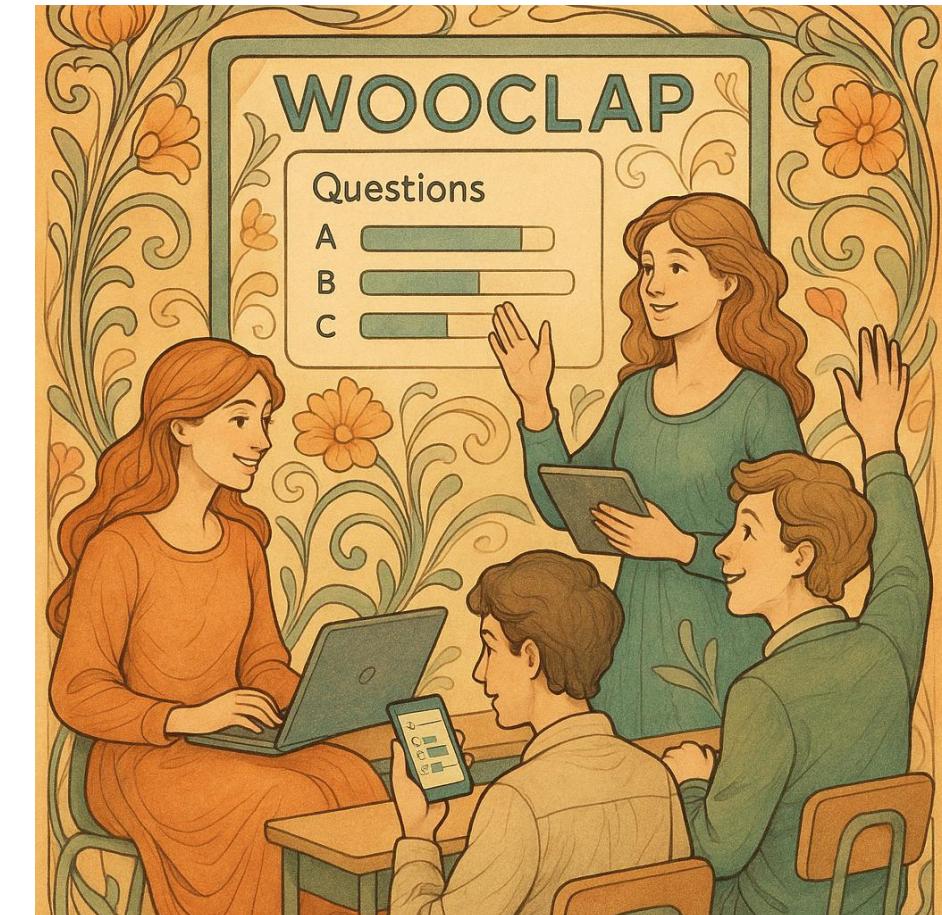
### ⚠️ Most Challenging Topics

Topic/Activity	Mentions
CTQ Tree creation and metric definition	35+
Applying Kano Model in nuanced contexts	10+
Apostle Model interpretation	5+



## Let's Review...

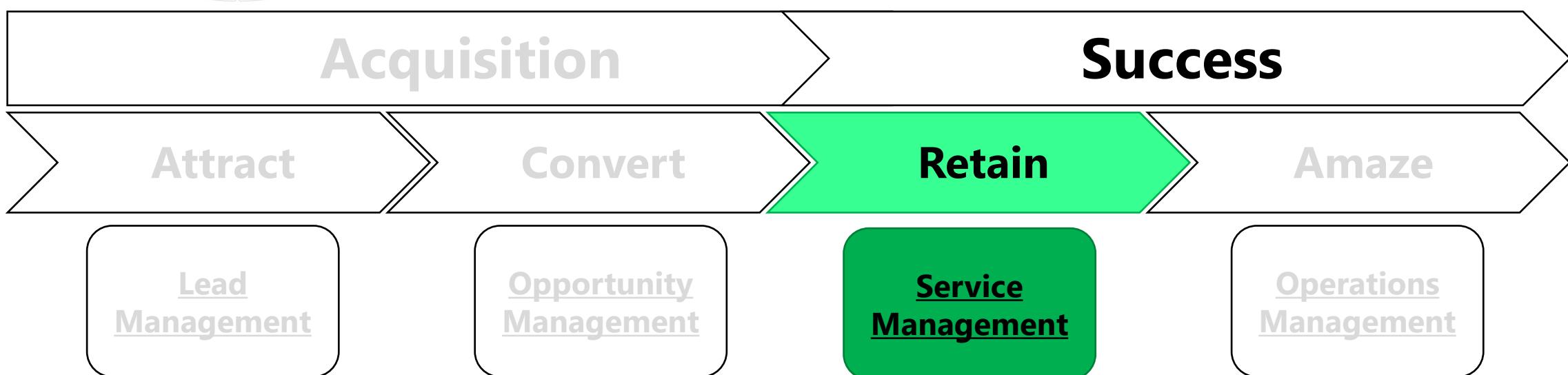
- Join the **Wooclap** event using the link or code.
- Sign in with your **SMU email** so your responses connect to your identity for attendance.
- For attendance, your presence is recorded when you join the event and submit at least one response. Stay in the event until class ends to ensure your attendance is captured.
- If you get disconnected, **rejoin using the same link/code and name**. Your participation will continue from where you left off.
- **Need help?** Let your TA / Instructor know right away if you can't access the event, log in, or submit answers so we can support you.



# Customer Success



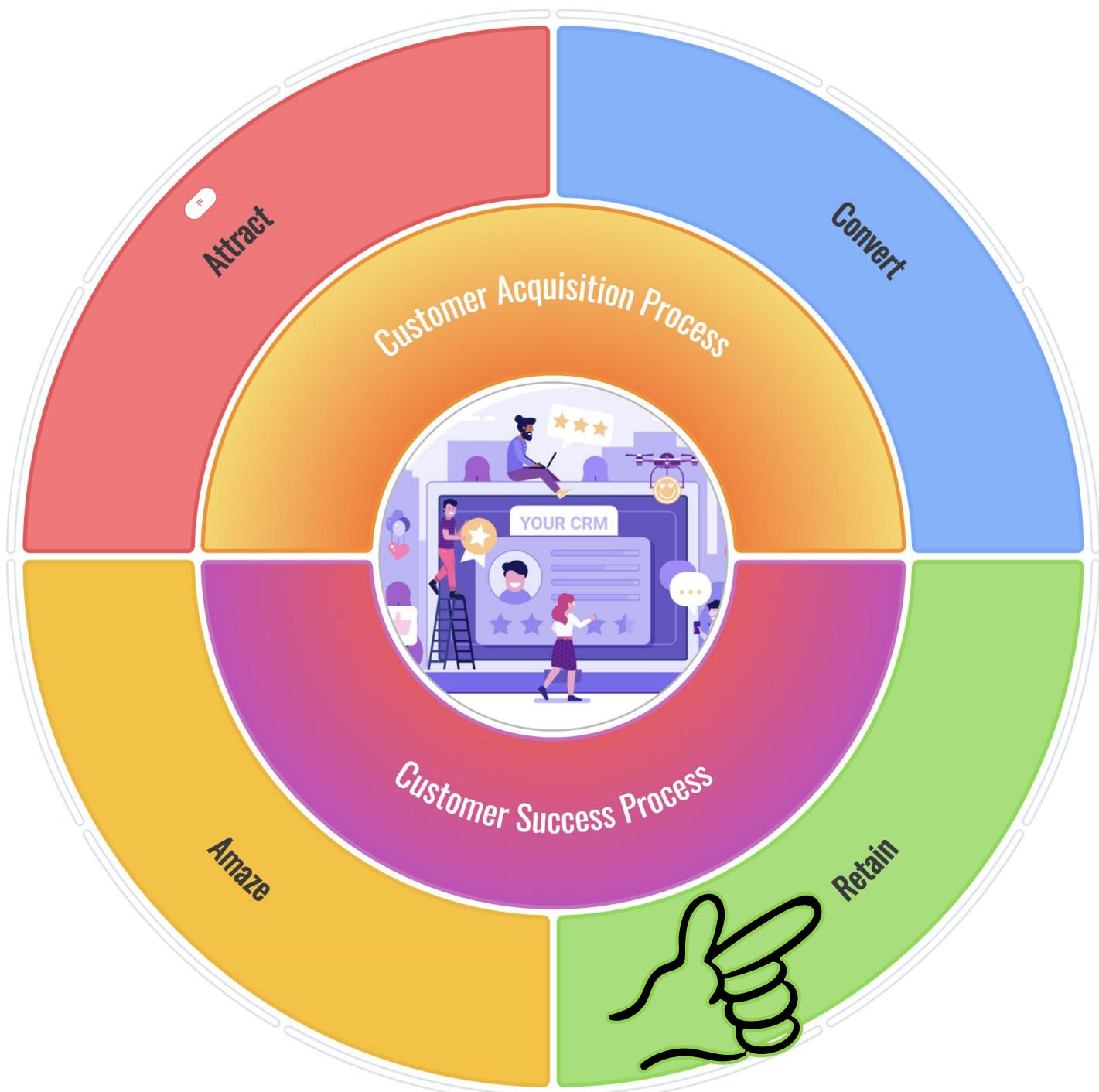
- **Part 1: Customer Acquisition Processes**
  - Attract new customers – **Marketing Organisation Unit**
  - Convert leads into accounts – **Sales Organisation Unit**
- **Part 2: Customer Success Processes**
  - Keep customers satisfied – **Service Organisation Unit**
  - Keep customers loyal – **Operations Organisation Unit**



# Big Picture

---

- Customer Acquisition
  - Attract: Marketing
  - Convert: Sales
- Customer Success
  - **Retain: Service** 
  - Amaze: Operations



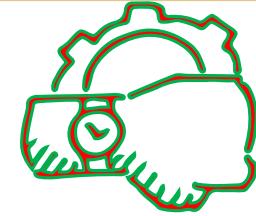
# Unit Learning Outcomes

## Knowledge



- Understanding CRM as a **comprehensive management strategy** to help organizations learn about customer behaviors, needs, preferences, and expectations to improve and maintain strong relationships
- Recognizing the importance of creating and maintaining a **Customer-Centric Business Culture** that prioritizes customer needs and experiences throughout the customer journey.

## Skills/Tasks



- Comprehend and utilize the **SERVQUAL** model to identify and address gaps in service quality.
- Understand and apply the **CARE Model** (Commitment, Action, Results, Empathy) in service design and customer interactions.
- Apply the **Importance - Satisfaction** Analysis to prioritize areas for service improvement.
- Customer Segmentation – RFM** (Recency, Frequency, Monetary)

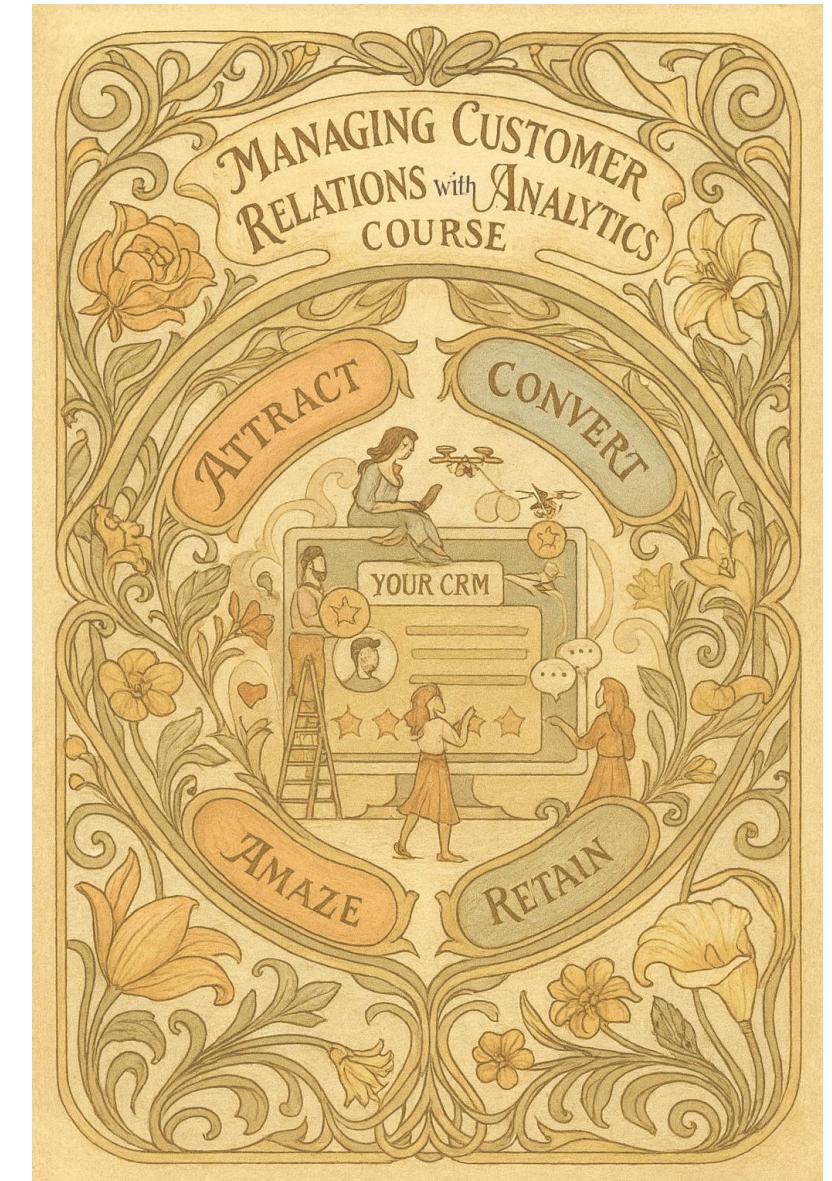
# Agenda

**01** Review / Wooclap

**02** High Quality Service 

**03** Service Models

**04** Customer Segmentation



# Consistent High-Quality Product



Journey to  
Satisfaction

High-  
Quality  
Product

**Customers** are satisfied whenever they consistently receive, in a **timely manner**, a **high-quality product**.



*Perfect as in thoroughly done,  
Zero (0) defects.*

*Timely as at the right time,  
this conflicts with perfect.*



## Student Perspective

Student perspectives reveal that product quality transcends mere functionality.

Brands excelling in **reliability**, **consistency**, and **user-centric design** cultivate loyalty, while those **tolerating defects**, **unreliability**, or **poor materials** risk irreversible reputational harm.

To thrive, companies should institutionalize **rigorous quality control**, invest in **user experience research**, and prioritize **reliable and well-crafted solutions**.



# Consistent High-Quality Service



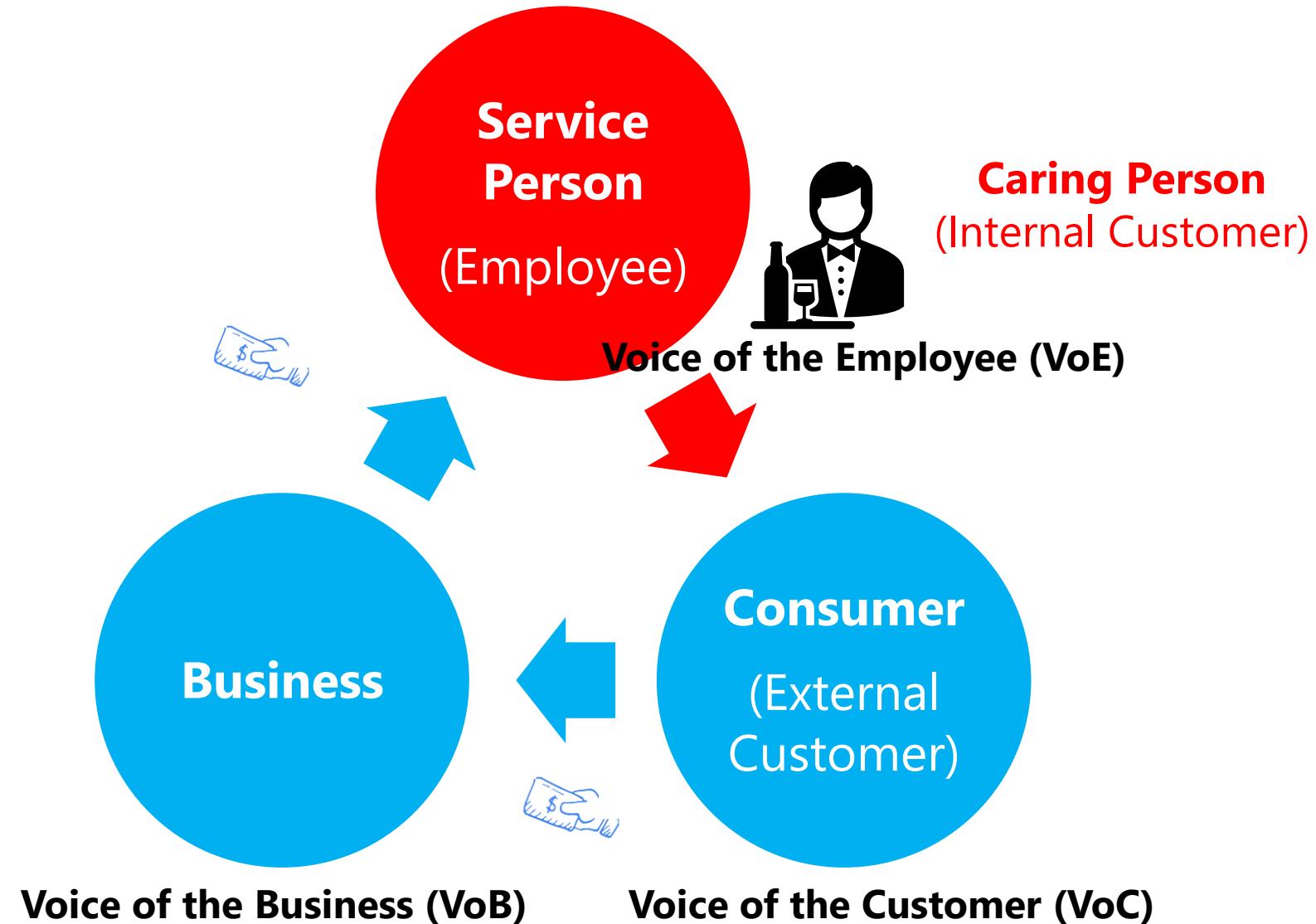
**Customers are satisfied whenever they consistently receive, in a timely manner, high-quality service**



## Commitment to Customer Satisfaction:

Ultimately, high-quality service is the commitment to ensure customer satisfaction **under reasonable conditions**. They take personal responsibility for the customer's experience and strive to **create positive outcomes**.

# The Service Person





## Caring Person

- **Empathy and Understanding:** A caring person in customer interactions shows the ability to understand and share the feelings of the customer. They actively listen to the customer's concerns and respond with genuine interest and compassion.
- **Attentiveness:** Caring individuals pay close attention to the customer's needs, both expressed and implied. They are fully present during interactions and make the customer feel valued and heard.
- **Patience and Respect:** A caring person exhibits patience when dealing with customer inquiries or issues, treating each customer with respect regardless of the situation's complexity or the customer's demeanor.
- **Proactive Problem-Solving:** Caring individuals go beyond simply addressing surface-level concerns. They take initiative to identify and resolve underlying issues, often anticipating customer needs before they are explicitly stated.
- **Personalized Approach:** A caring person tailors their communication and service to each individual customer, recognizing that every interaction is unique and deserves a personalized touch.
- **Emotional Intelligence:** Caring individuals possess high emotional intelligence, allowing them to navigate complex emotional situations and respond appropriately to customer feelings and reactions.

# Service Experiences



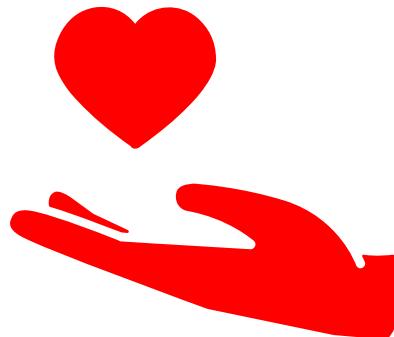
## Share Real life service experiences



With your project team, discuss about **real life service experiences** and complete the form at:

<https://forms.office.com/r/f6Nu1SuF61>

One submission per team...



4. Provide a real life example when you experienced **an amazing customer service experience** \*   
After sharing amazing customer service experiences between team members, pick the most memorable one and share it in here.

Enter your answer

5. Provide a real life example when you experienced **a lousy customer service experience** \*   
After sharing lousy customer service experiences between team members, pick the most memorable one and share it in here.

Enter your answer

6. In one word, what constitutes **an amazing customer service experience**? \*

Enter your answer

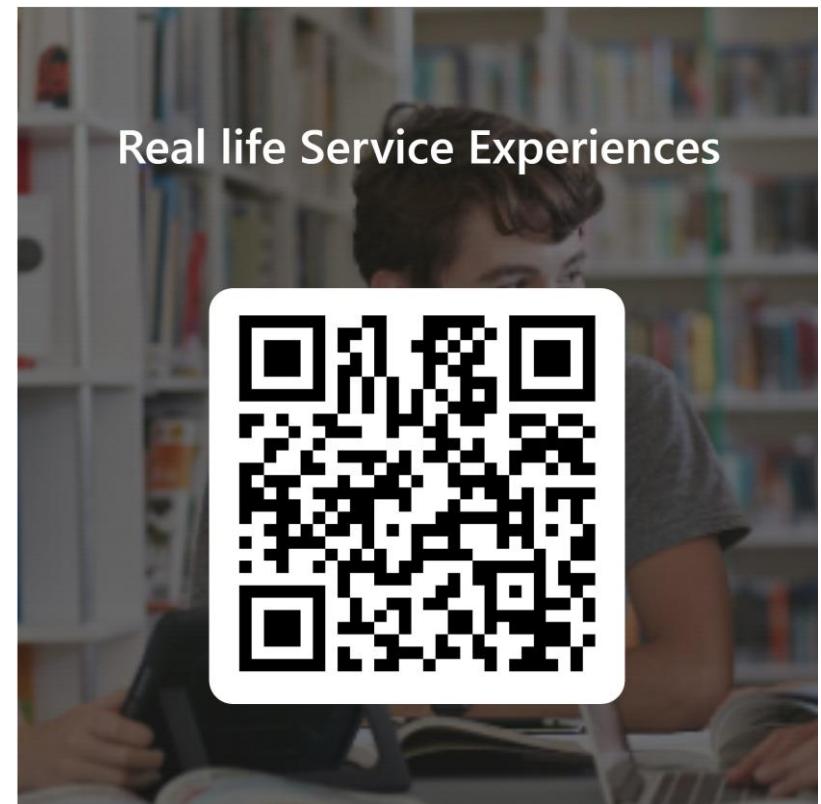
7. In one word, what constitutes a **lousy customer service experience**? \*

Enter your answer

Send me an email receipt of my responses



10 minutes



# In-Class Activity

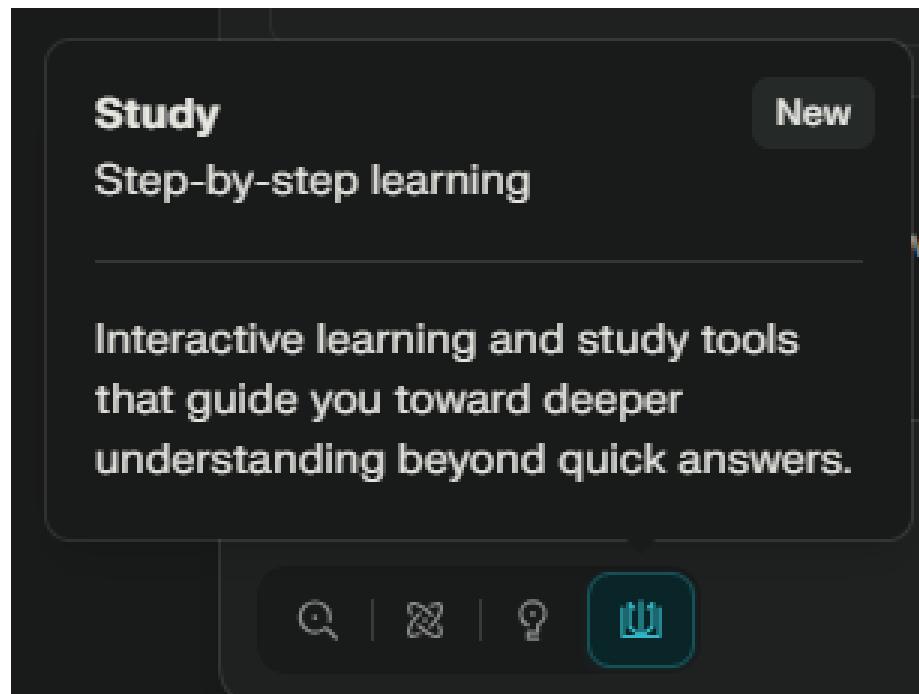


## Use the Six Sigma Mentor

**Tip use Study Mode:** Post your CTQ proposal at your **team private channel**



**10 minutes**



The screenshot shows a dark-themed mobile application interface. At the top left is the word "Study". To its right is a "New" button. Below "Study" is the text "Step-by-step learning". A horizontal line separates this from a larger text block below: "Interactive learning and study tools that guide you toward deeper understanding beyond quick answers." At the bottom of the screen are four icons: a magnifying glass for search, a double arrow for refresh, a question mark for help, and a stylized "W" logo.

CTQ Tree for **Consistent High-Quality Service**

**Critical Need:** Consistent high-quality service that makes customers feel valued and cared for



# Agenda

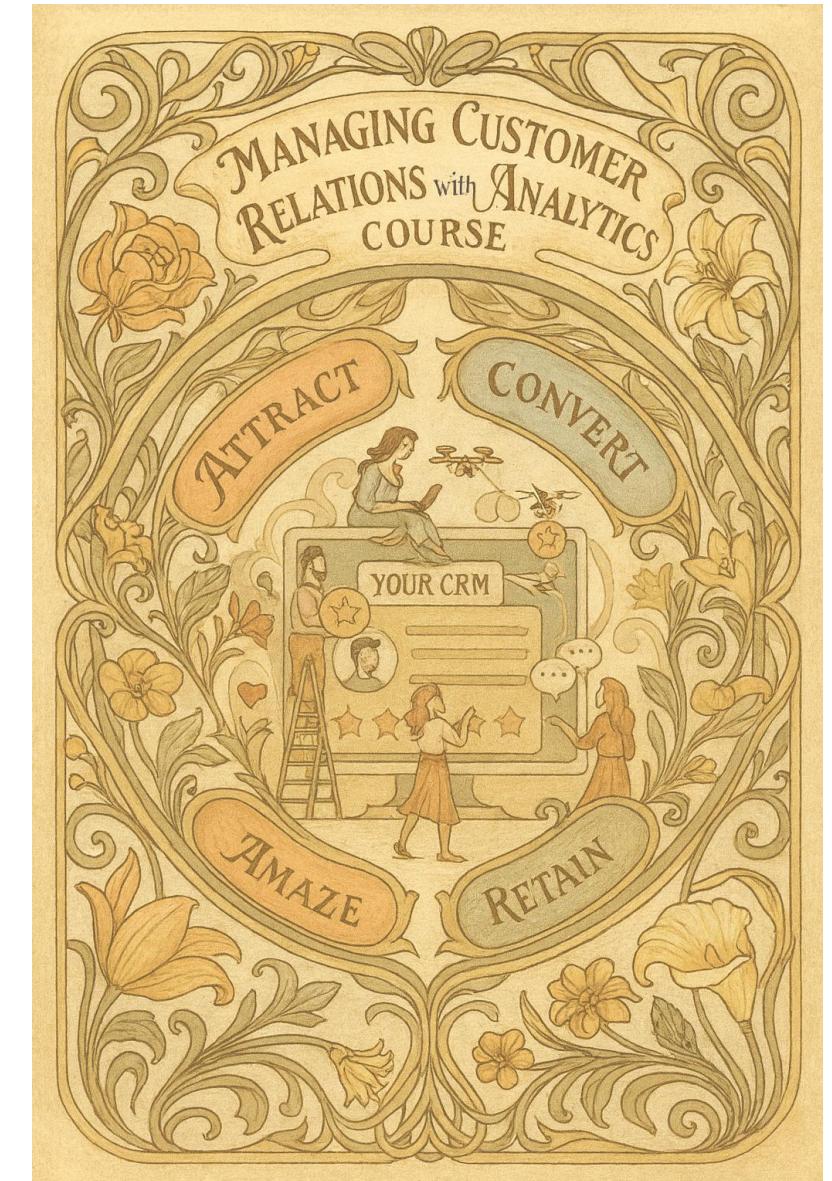
**01** Review / Wooclap

**02** High Quality Service

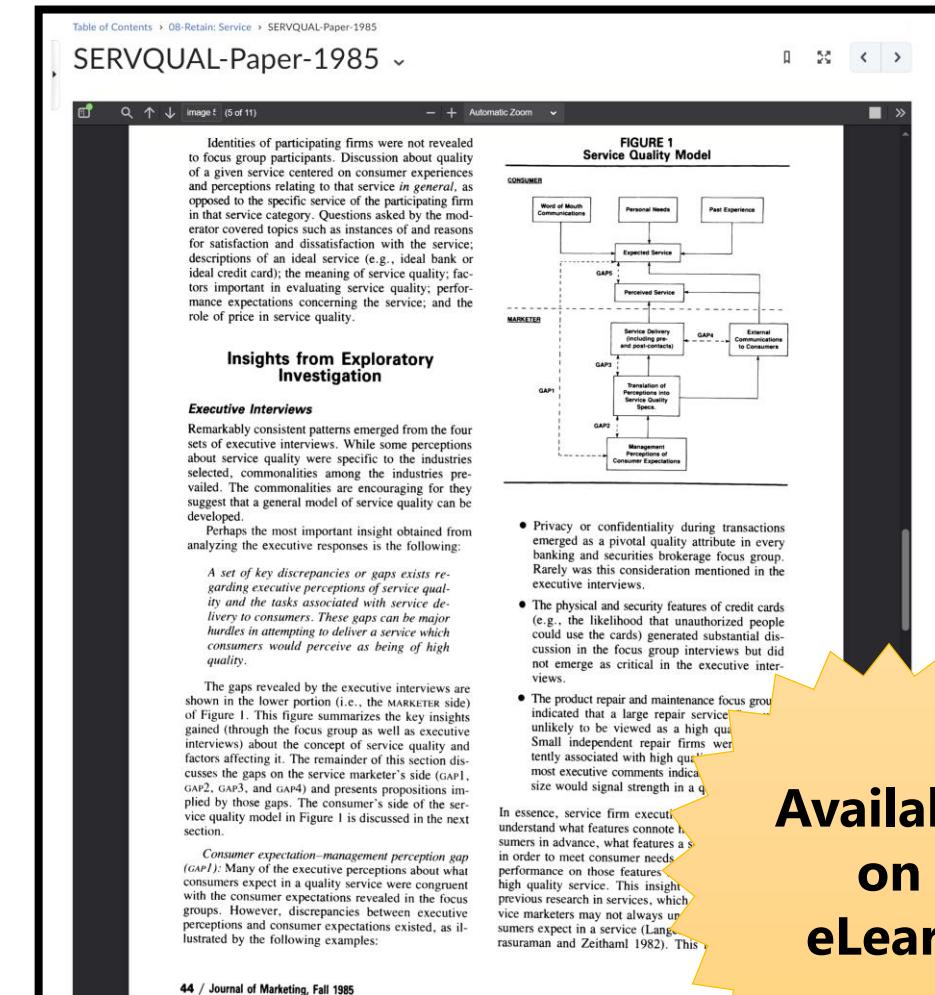
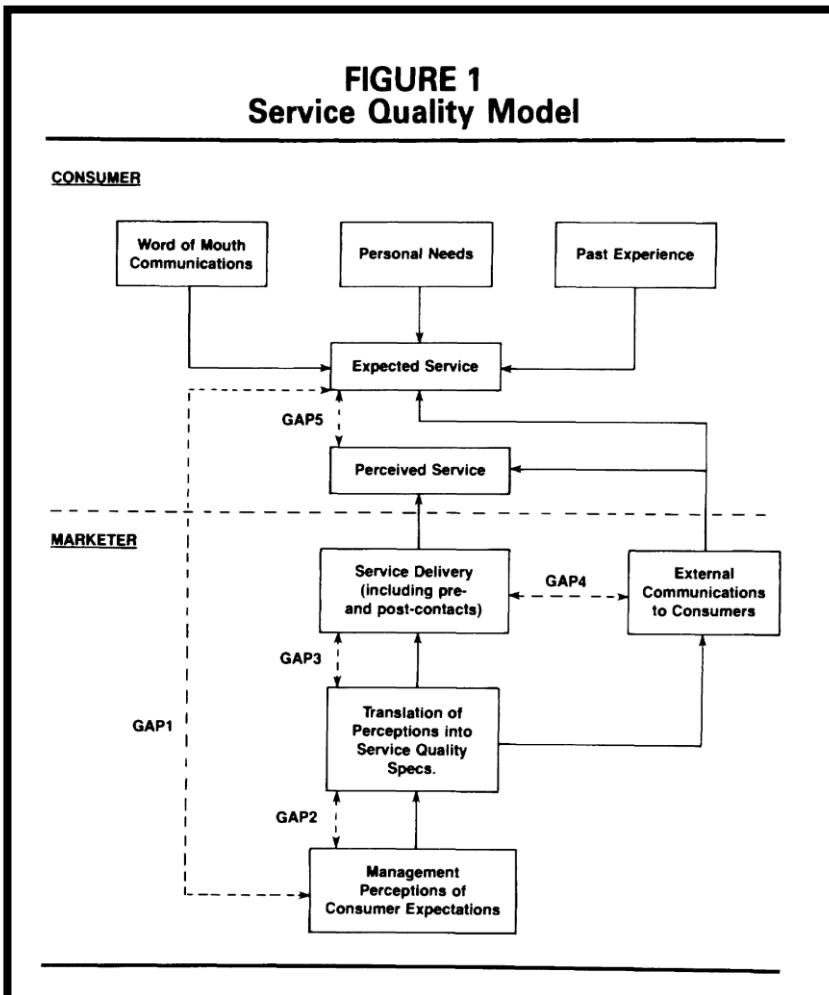
**03** Service Models



**04** Customer Segmentation

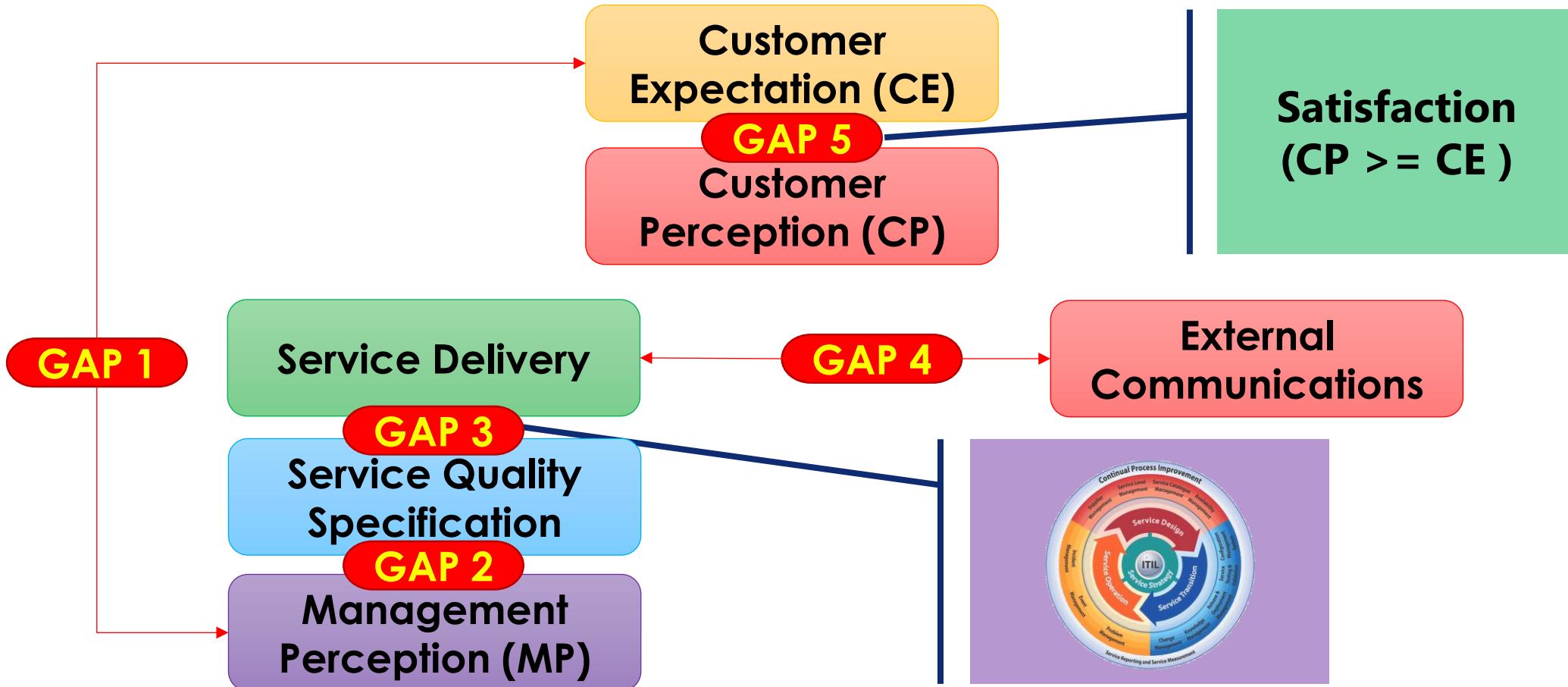


- Service Quality Model - 1985



Available  
on  
eLearn

# SERVQUAL: Big Picture





## SERVQUAL

- **Expectation** is the idea of the product that the customer has in mind.
- **Expectation** is influenced by **external communications** and **previous experiences** with products in a similar category.
- **Perception** is based on real interactions with the product and service organization.
- **Perception** is derived from the **quality of the product** and the **service delivery**.

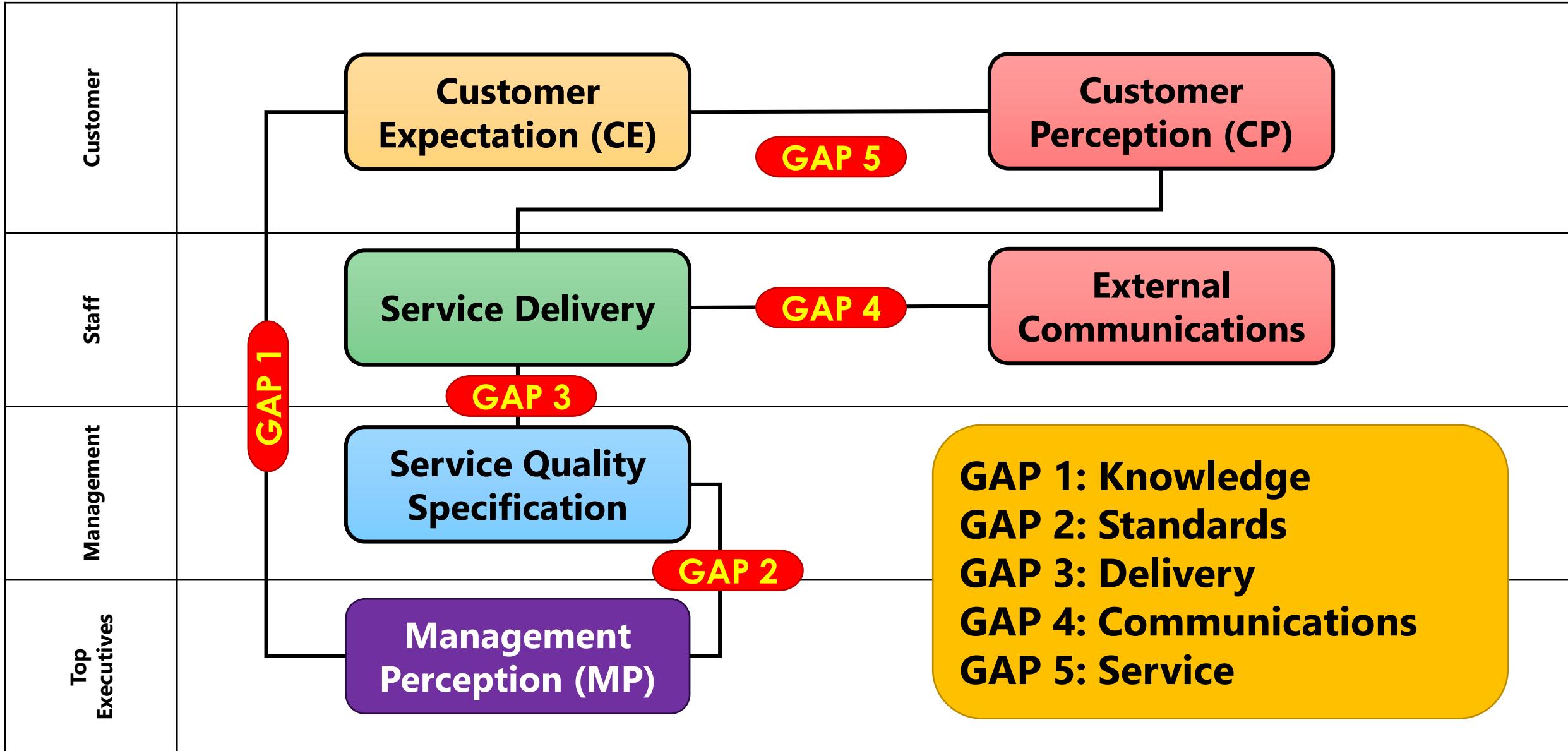
External  
Communications

Previous  
Experiences

Product Quality

Service Delivery

# Service Quality Model





**When communicating with executives (top management) and middle management, staff should tailor their approach based on the different needs, expectations, and focuses of these two different stakeholders.**



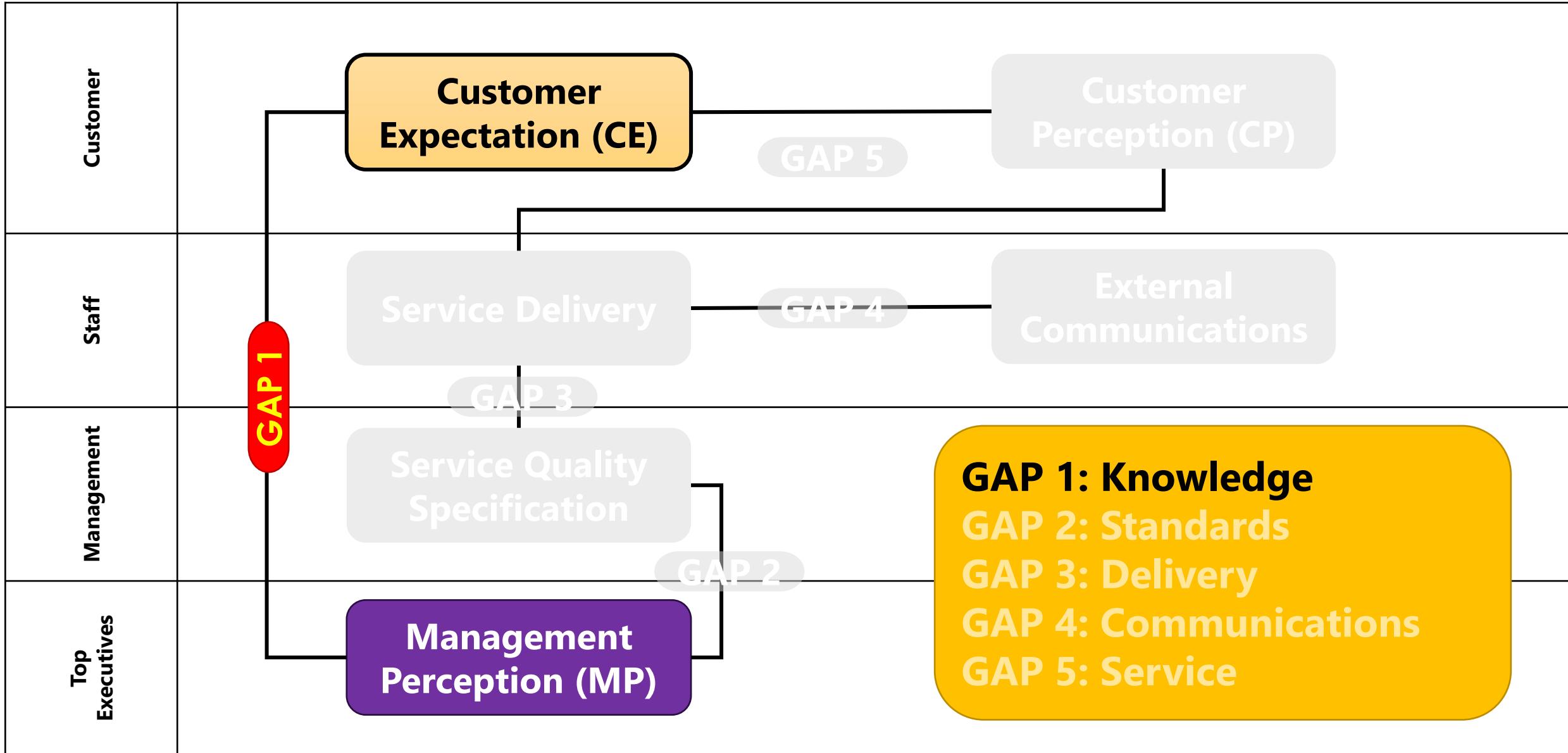
## Communicating with Executives (Top Management)

- 1. Be Concise and Clear:** Executives are often pressed for time, so your communication should be direct and to the point. Avoid unnecessary details and focus on key points.
- 2. Focus on Strategic Relevance:** Highlight how your message, idea, or issue aligns with the company's strategic goals and vision. Show the broader impact on the organization.
- 3. Provide Data and Evidence:** Support your statements with relevant data, metrics, and evidence. Executives rely on data-driven insights to make decisions.
- 4. Offer Solutions, Not Just Problems:** When presenting an issue, also propose potential solutions or alternatives. Executives appreciate proactive thinking and problem-solving.
- 5. Use Formal Language and Structure:** Maintain a formal tone and structure in your communication. Use professional language and avoid jargon unless it's commonly understood at the executive level.
- 6. Be Prepared for Questions:** Be ready to answer questions and provide additional details if requested. Executives may seek further clarification on critical points.

## Communicating with Middle Management

- 1. Be Specific and Detailed:** Middle managers are responsible for implementing strategies, so provide specific details that help them understand the practical implications of your message.
- 2. Link to Operational Goals:** Relate your communication to the business unit operational objectives. Show how it impacts their day-to-day responsibilities and goals.
- 3. Encourage Two-Way Dialogue:** Middle managers often appreciate collaborative communication. Encourage feedback and discussion to ensure mutual understanding and buy-in.
- 4. Be Solution-Oriented:** Like with executives, when presenting an issue, offer potential solutions. Middle managers value actionable insights that can help them address challenges.
- 5. Use Accessible Language:** While still professional, your language can be more accessible and less formal than when communicating with executives. Ensure clarity and avoid overly technical terms unless necessary.
- 6. Follow-Up:** Provide follow-up communication to keep middle managers informed about progress or updates related to your initial message. This helps in maintaining alignment and transparency.

# Service Quality Model



# SERVQUAL Model



## Knowledge GAP (#1)

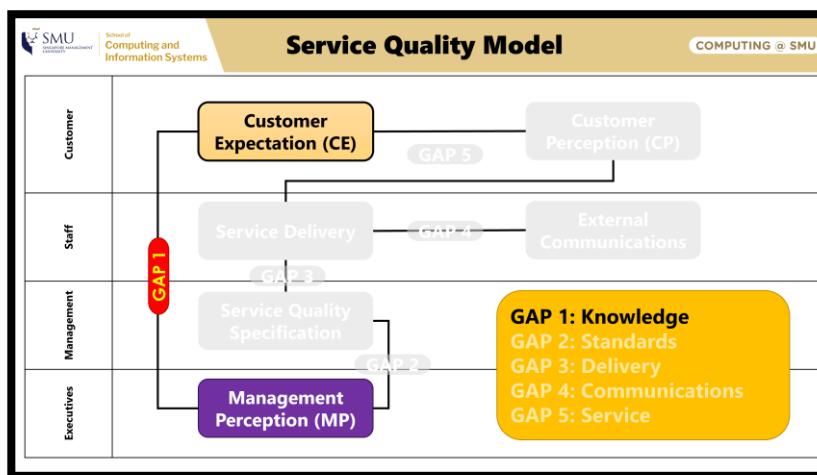
Top Managers (**Executives**) may not accurately understand or interpret what customers expect from their services.

**Impact:** Leads to misaligned service strategies, where companies might focus on meeting incorrect or non-existent customer needs.

Customer  
Expectation (CE)

GAP 1

Management  
Perception (MP)



# Knowledge GAP example



## Employers' vs Employees

Exhibit 2

**Employers do not fully understand why employees are leaving.**

**Factors that are important to employees versus what employers think is important**

- ▶ Employers seem to overlook the relational elements that are key drivers for why employees are leaving, such as lack of belonging or feeling valued at work.

More important to employees than employers appreciate

As important to employees as employers think

McKinsey & Company

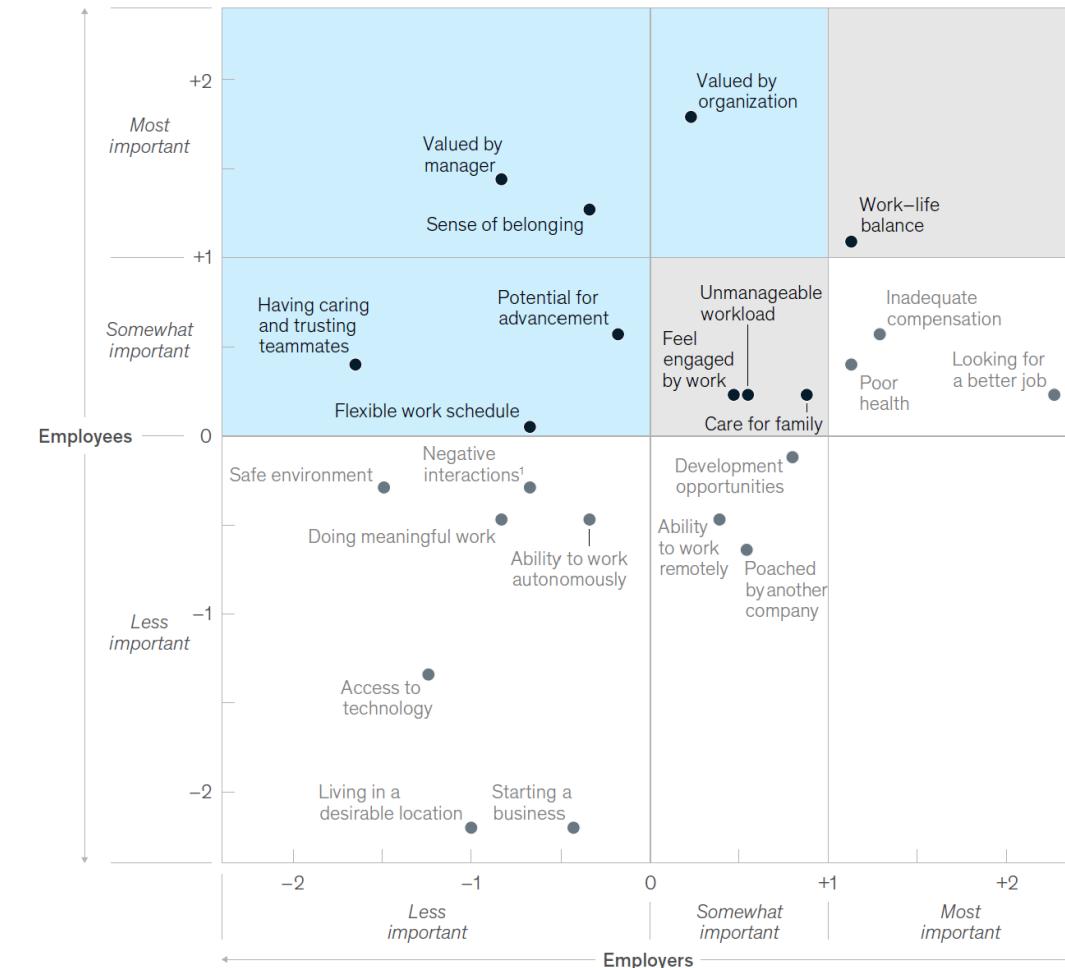
People & Organizational Performance Practice

**In the spotlight: Performance management that puts people first**

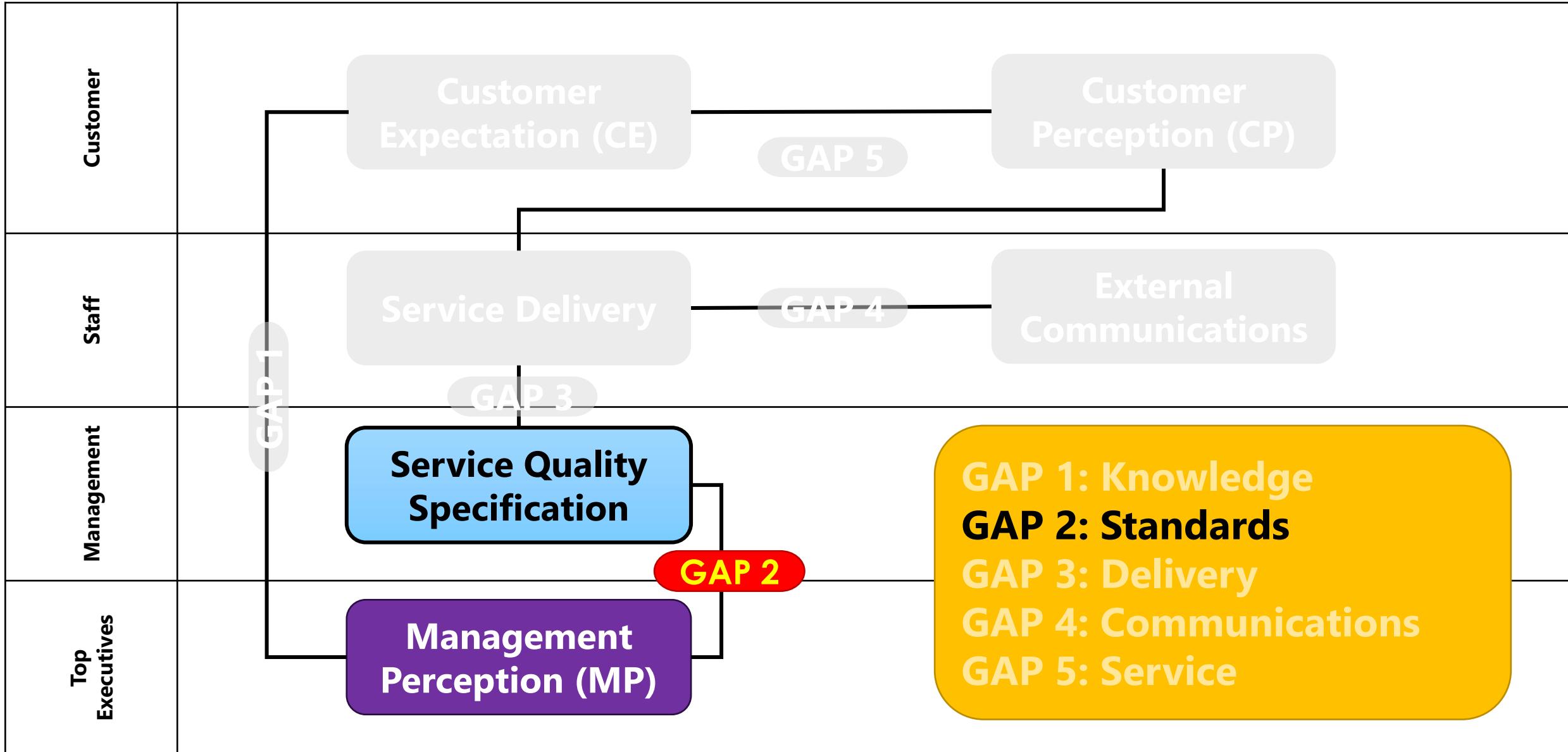
Performance management systems help people continuously develop—but most companies fall short of best practices. A set of defined design choices can help guide leaders forward.

by Armaia Noguera Lasa, Andrea Pedroni, and Asmus Kamm with Simon Gallot Lavallée

May 2024



# Service Quality Model



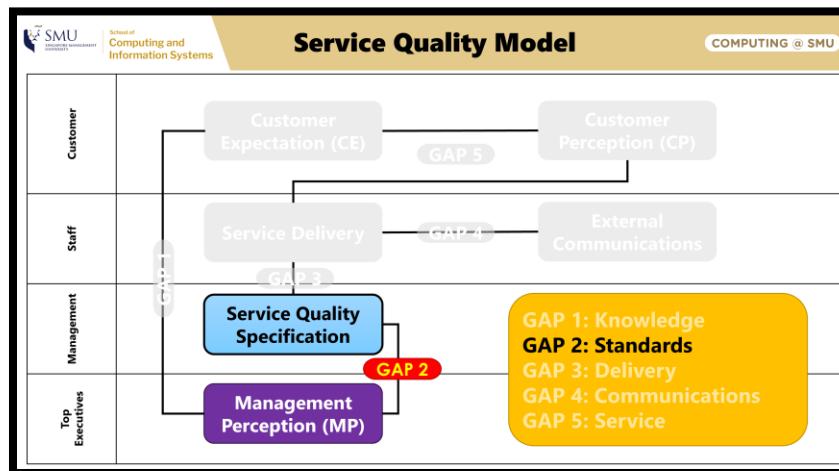
# SERVQUAL Model



## Policy GAP (#2)

**Management's** failure to translate their understanding of customer expectations into clear, **actionable service quality standards**.

**Impact:** Results in poor service design, lack of clear standards, and an inability **to consistently update and maintain service quality.**



Service Quality  
Specification

GAP 2

Management  
Perception (MP)

McKinsey  
& Company

People & Organizational Performance Practice

## The critical role of strategic workforce planning in the age of AI

Gen AI has increased uncertainty about workforce skills and capabilities. Organizations that harness AI-driven innovation find it makes strategic thinking and talent planning easier.

This article is a collaborative effort by Neel Gandhi, Sandra Durth, and Vincent Bérubé, with Kriti Kedia and Randy Lim, representing views from McKinsey's People and Organizational Performance Practice.



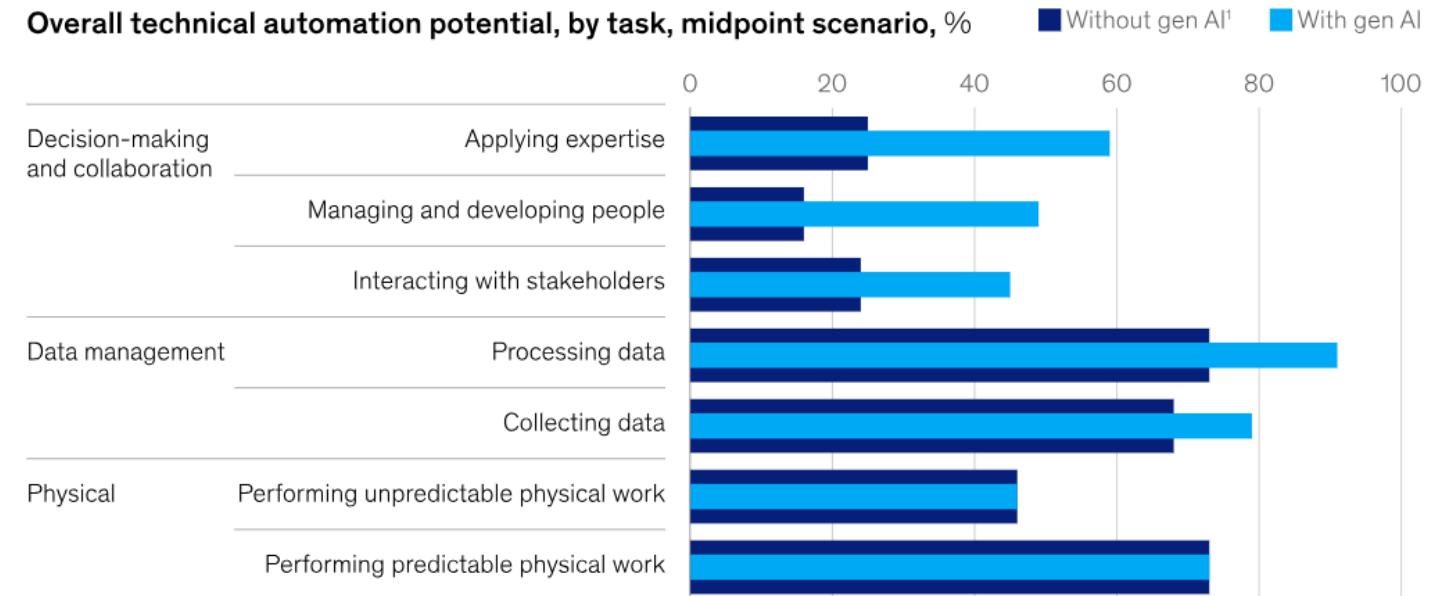
February 2025

Available  
on  
eLearn

Exhibit 1

**Gen AI may have a big impact on tasks that previously had low potential for automation.**

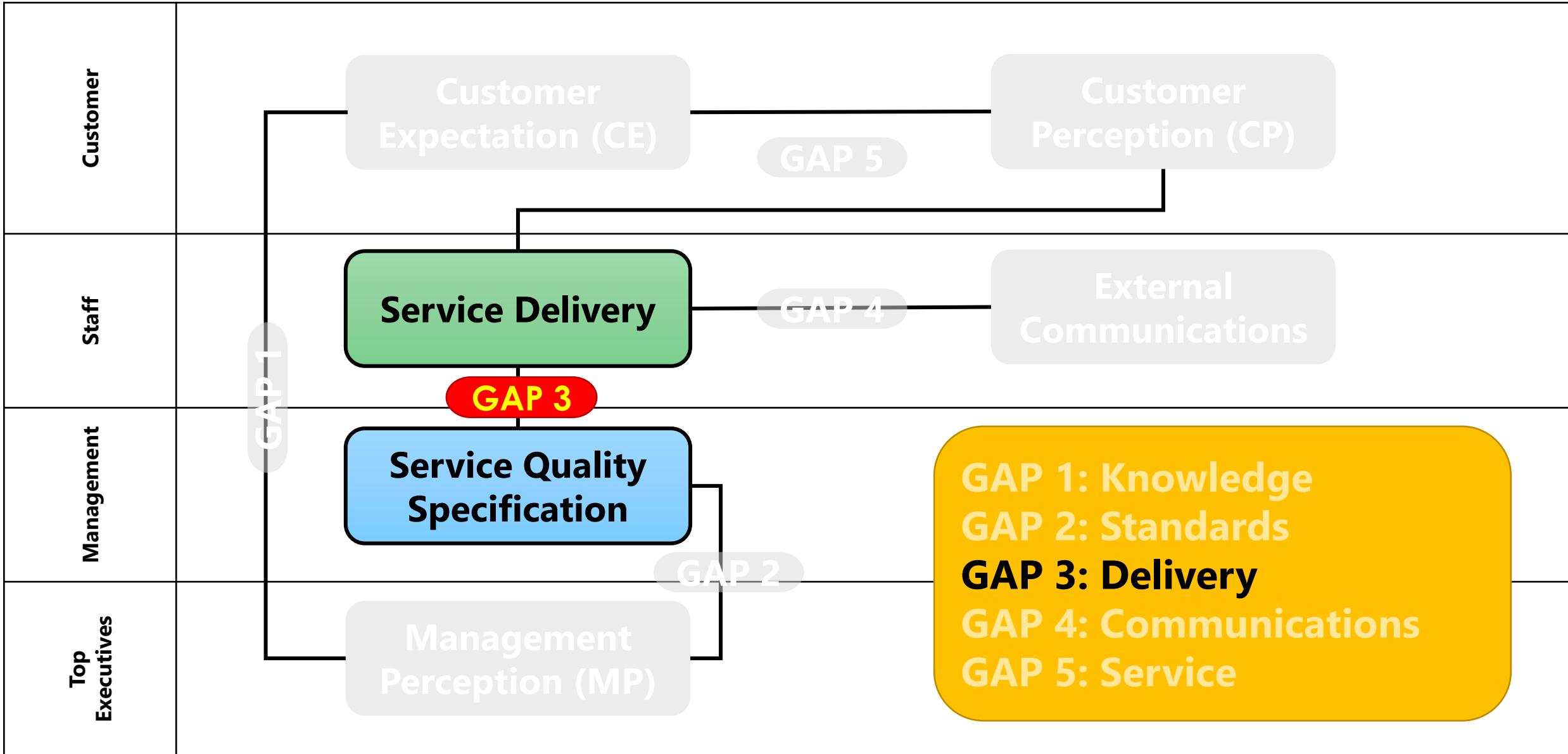
Overall technical automation potential, by task, midpoint scenario, %



<sup>1</sup>Previous assessment of work automation before the rise of gen AI.  
Source: McKinsey Global Institute analysis

McKinsey & Company

# Service Quality Model



# The Delivery GAP #3



## Delivery GAP (#3)



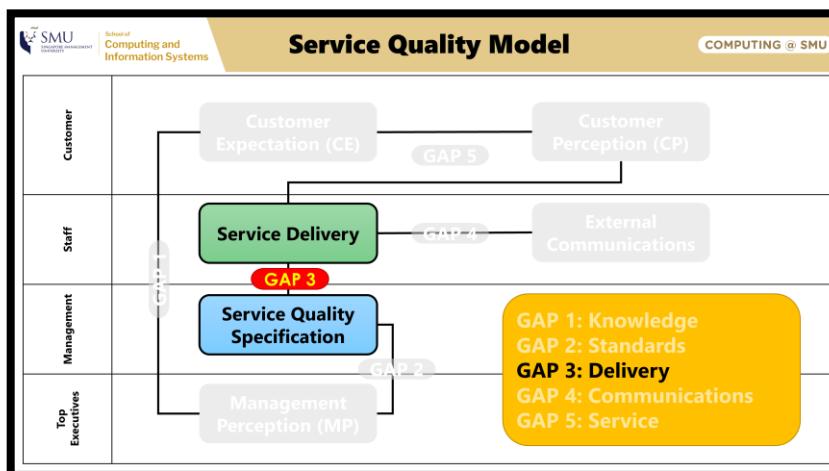
The gap between established service quality standards and the actual service delivered by employees.

**Impact:** Inconsistent employee performance and difficulties in adhering to standards lead to a variability in the quality of service perceived by customers.

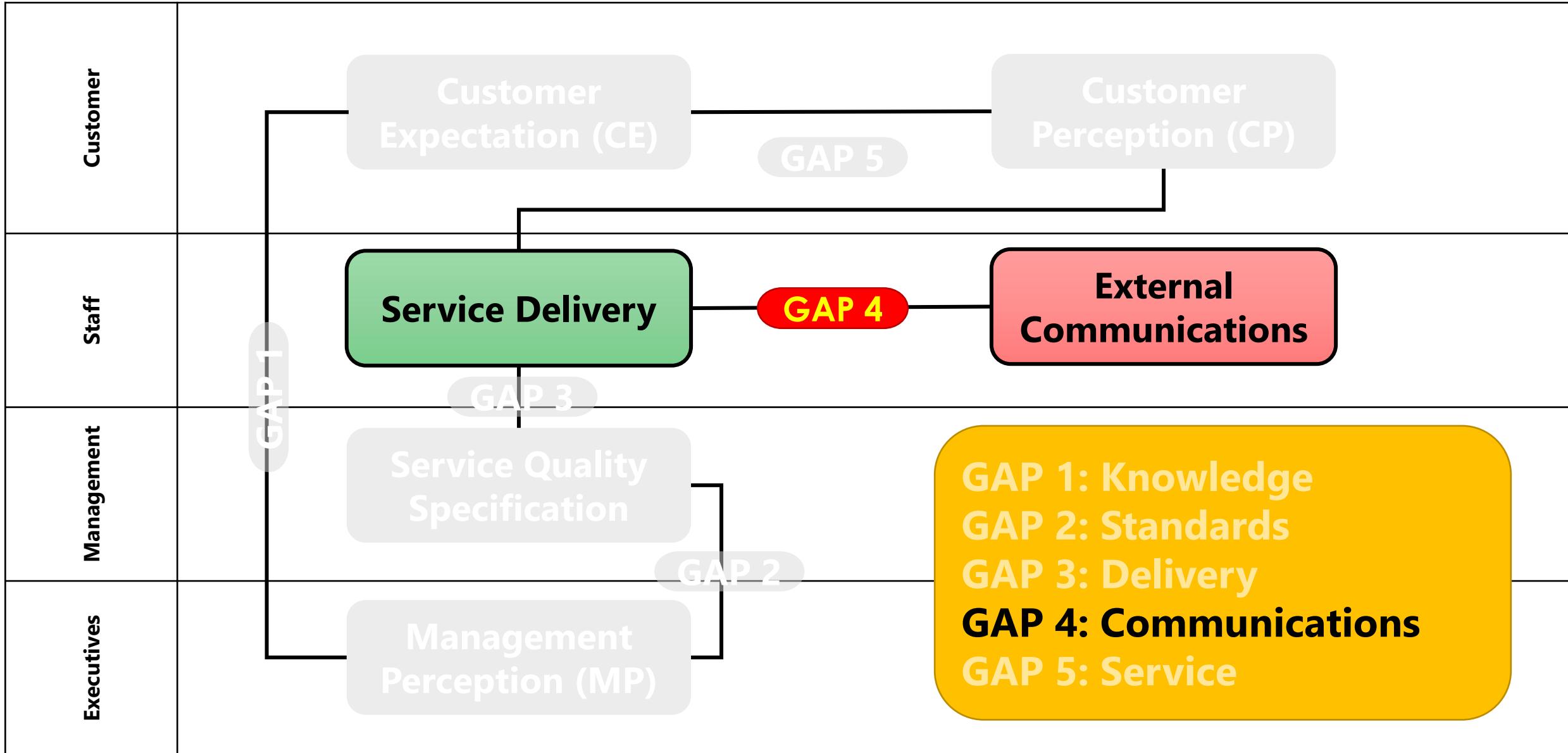
Service Delivery

GAP 3

Service Quality  
Specification



# Service Quality Model





## Communication GAP (#4)

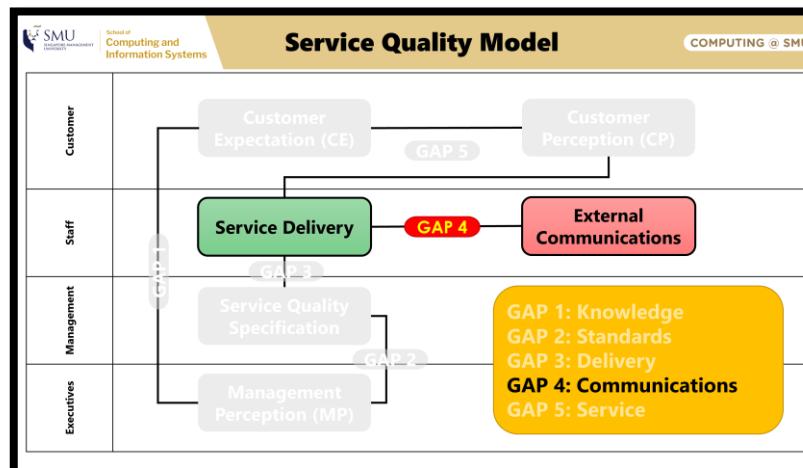
The difference between what an organisation promises through its external communications (advertising, promotions) and what it delivers.

**Impact:** When organisations promise more than they can deliver, it raises customer expectations, which, if unmet, lead to dissatisfaction and perceptions of poor service quality.

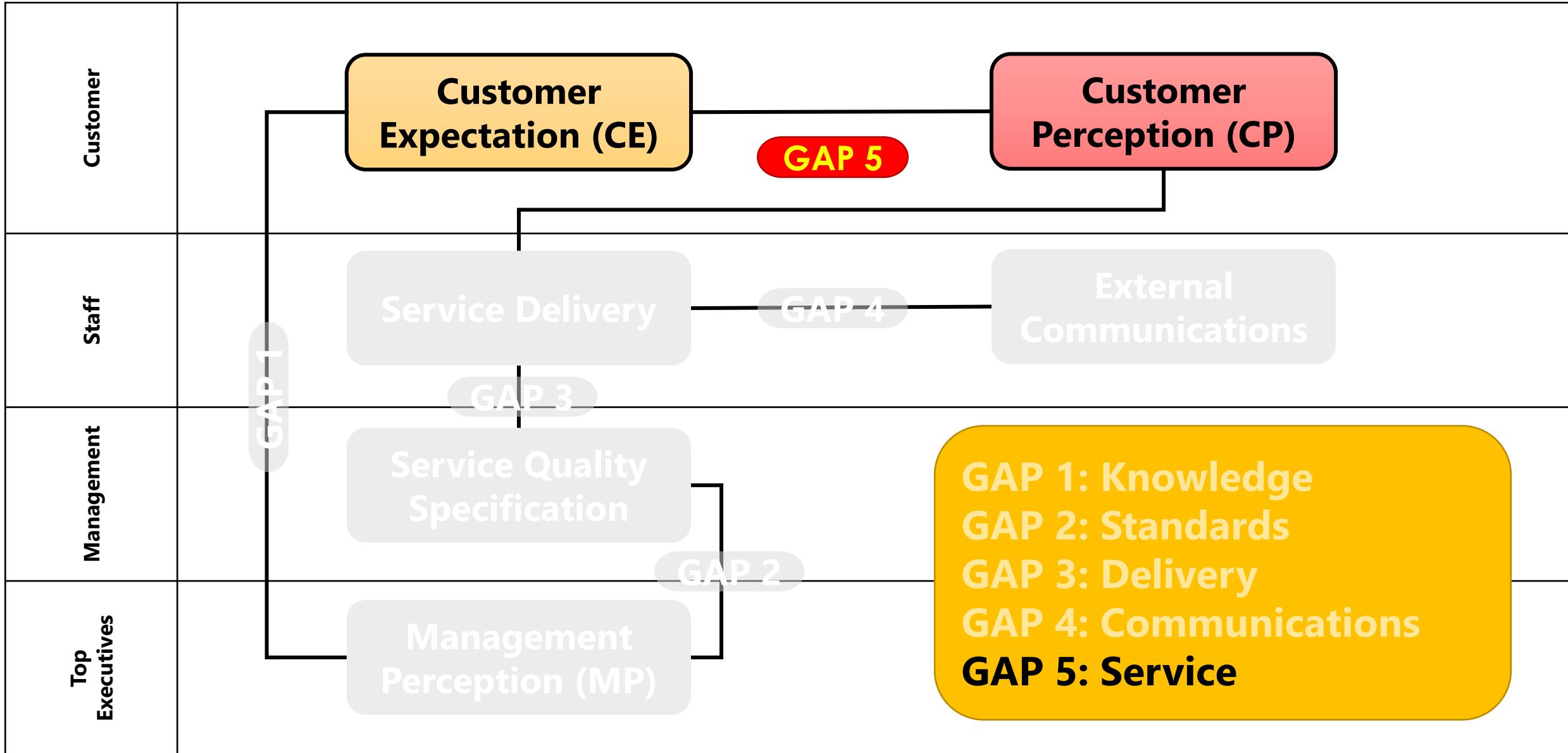
Service Delivery

GAP 4

External  
Communications



# Service Quality Model



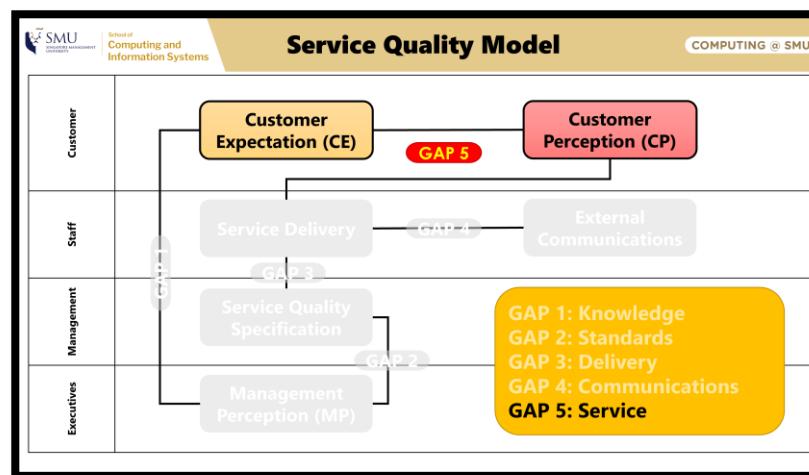
# SERVQUAL Model



## Service GAP (#5)

The gap between what customers expect and what they perceive they receive.

**Impact:** The overall perceived service quality depends on whether customer expectations are met or exceeded. This gap encapsulates the cumulative effect of the other four gaps.



**Customer  
Expectation (CE)**

**GAP 5**

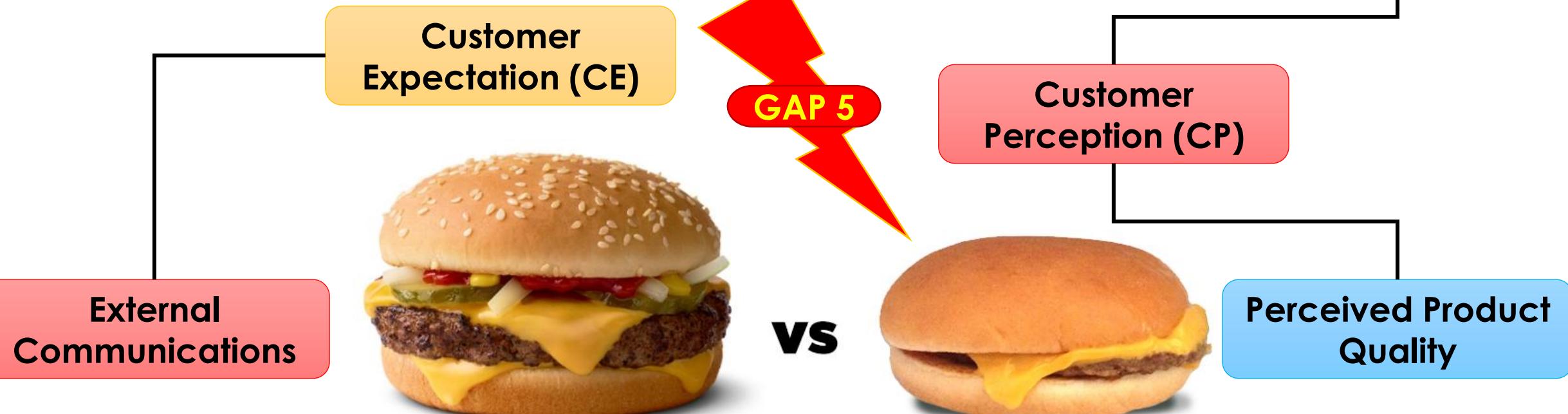
**Customer  
Perception (CP)**

# Over promised – under deliver

GAP 5

## Dissatisfaction

Dissatisfaction happens when  
 $CP < CE$



# Please complete this survey



## Midterm Eval

<https://smu.sg/IS466Midterm>



10 minutes

### IS446-MCRA Midterm class evaluation

Please submit feedback regarding the course you are taking

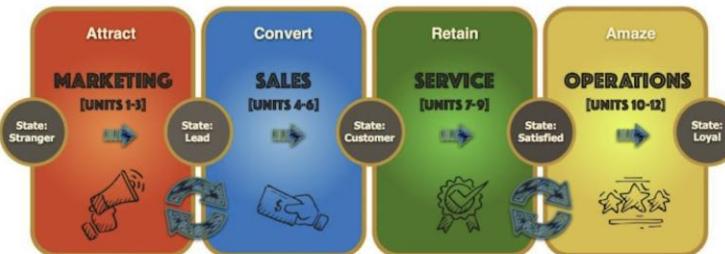
rafaelbarros@smu.edu.sg [Switch accounts](#) 

\* Indicates required question

Email \*

Record rafaelbarros@smu.edu.sg as the email to be included with my response

### MCRA - Learning Journey (Sales Organization)



# Agenda

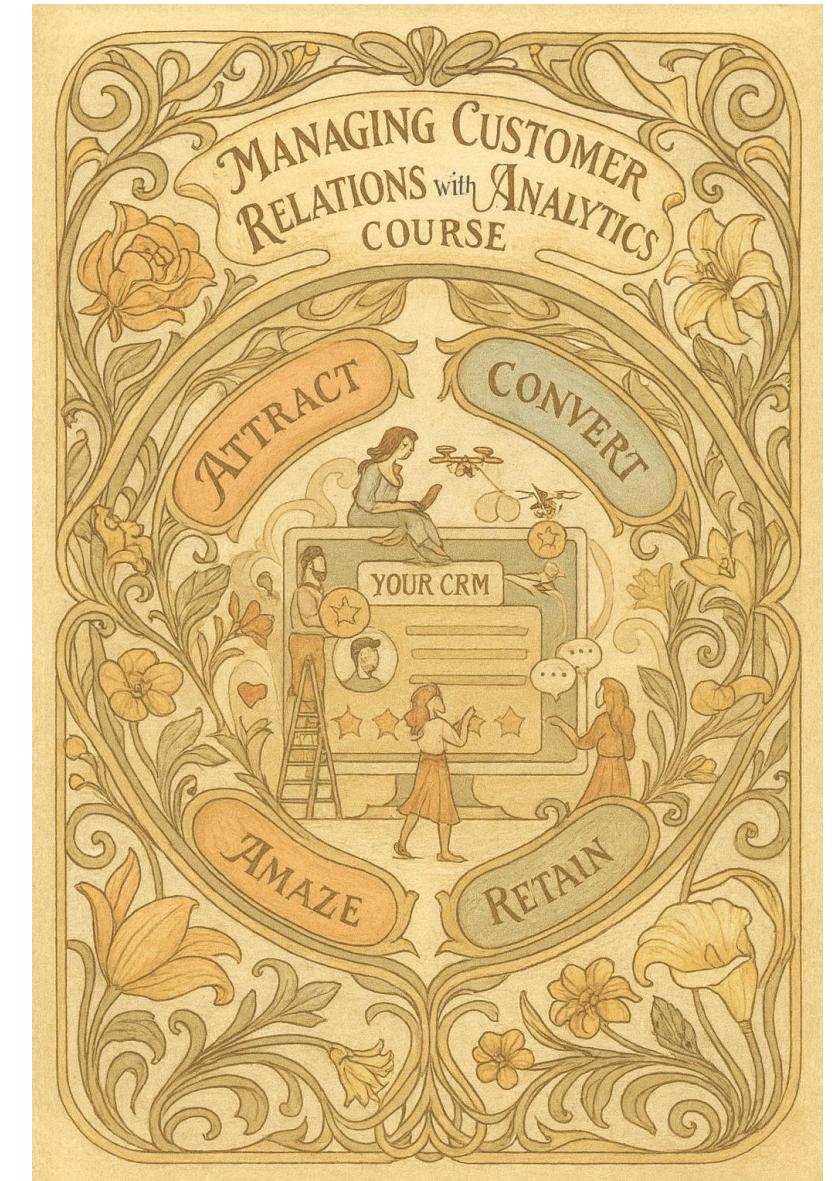
**01** Review / Wooclap

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**03** Service Models



**04** Customer Segmentation



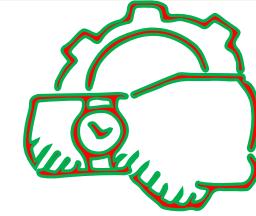
# Unit Learning Outcomes

## Knowledge



- Understanding CRM as a **comprehensive management strategy** to help organizations learn about customer behaviors, needs, preferences, and expectations to improve and maintain strong relationships
- Recognizing the importance of creating and maintaining a **Customer-Centric Business Culture** that prioritizes customer needs and experiences throughout the customer journey.

## Skills/Tasks

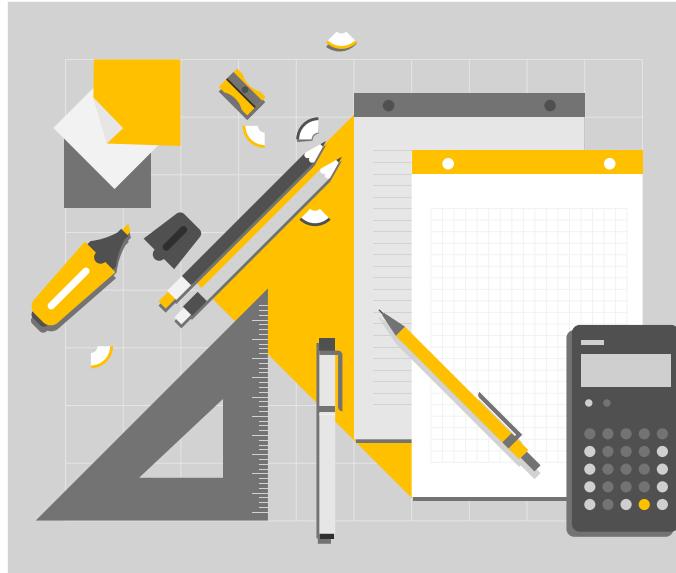


- Comprehend and utilize the **SERVQUAL** model to identify and address gaps in service quality.
- Understand and apply the **CARE Model** (Commitment, Action, Results, Empathy) in service design and customer interactions.
- Apply the **Importance - Satisfaction** Analysis to prioritize areas for service improvement.
- **Customer Segmentation – RFM** (Recency, Frequency, Monetary)



## Other Service Model

- **CARE** Model – How to design the experience
- **FLOW** Model – How to live the experience



# CARE Model Template



## Commitment

being dedicated to a cause,  
activity



## Action

process of doing  
something



## Results

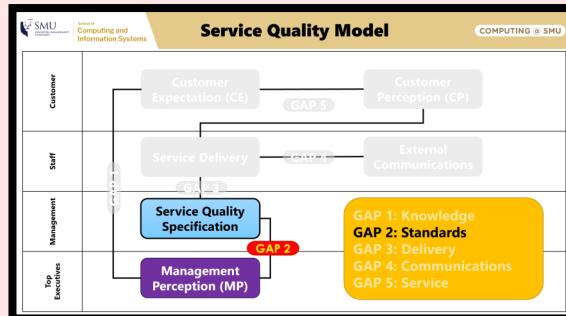
expected outcome as  
consequence of the actions



## Empathy

ability to understand and  
feel what someone else is  
feeling.

### What is our **value proposition**?



**Service Quality Specification**

### How our solution help(s) the job to be done?

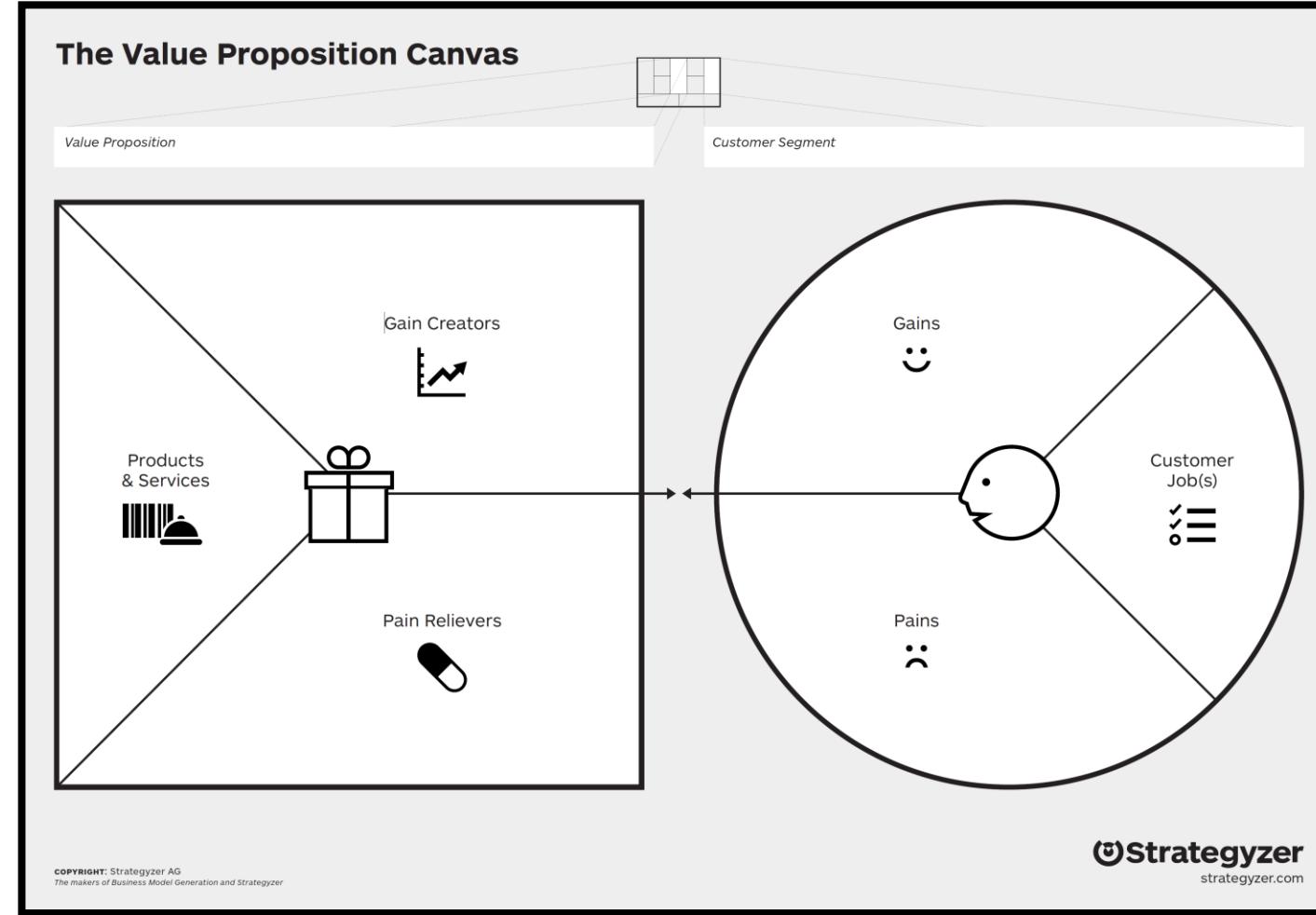
### What are the experience objectives and key-results?

### How do my customer is usually feeling when the interaction happens?

# Use the Value Proposition Canvas



## What is our value proposition?



### Commitment

being dedicated to a cause,  
activity

**What is our value  
proposition?**

## Value Proposition

A clear and concise sentence that conveys:

### Benefits + Relevance + Differentiation

What **specific benefits** can your innovation bring? What makes your innovation **valuable**?

Connect this value to the problem/needs.  
How can your innovation **solve the problem**?

**Why should your client work with you** instead of your competitor? What makes you **unique**?



**WELCOME TO THE CENTRE FOR ENGLISH COMMUNICATION**  
Every Student An Effective Communicator

**Product does Benefits by doing Differentiation**

# A WORLD-CLASS UNIVERSITY YOU CAN CALL HOME

## GLOBAL REPUTATION

**19<sup>th</sup>**  
Best

Young University (QS  
World University  
Rankings 2024)

**2<sup>nd</sup>**  
Worldwid

For Software  
Engineering  
CSRankings 2023

**1<sup>st</sup>** Singapore  
University

Only TRIPLE CROWN  
ACCREDITED Business School in  
Singapore (AACSB, AMBA,  
EQUIS)  
Lee Kong Chian School of Business

**1<sup>st</sup>** Worldwide

Citation Rankings, Archival  
Research (All Topics) and  
Archival Research (Financial  
Accounting) (Brigham Young  
University Accounting Research  
Rankings 2022)

## CAREER ADVANTAGE

**92.3%**

Secured employment  
within 6 months of  
graduation

## INNOVATIVE CURRICULUM

**500+**

Double degree and  
double major  
combinations

**100%**

Guaranteed 2<sup>nd</sup>  
majors & small  
class sizes

## GUARANTEED GLOBAL EXPERIENCE

**100%**

Guaranteed  
for all  
students

**220+**

Partner  
universities  
around the world

## STRATEGIC CITY LOCATION

**1<sup>st</sup>** Singapore  
University

With city campus located  
beside the Central  
Business District

# SCIS Value Proposition

## WHY SMU SCHOOL OF COMPUTING AND INFORMATION SYSTEMS?

**HIGH GRADUATE EMPLOYABILITY**

- \$5,400 Median gross monthly salary for SCIS Graduates\*
- 7 in 10 SCIS Graduates secured employment before graduating
- 95.1% Overall employment rate\*

\*Source: Graduate Employment Survey 2022\*

**EXPERIENTIAL LEARNING & GLOBAL EXPOSURE**

- Apply concepts to real-world projects and be industry-ready graduates with an understanding of global development.
- Work with faculty on their innovative research, and learn from professionals with diverse experience.

**WORLD-CLASS COMPUTER SCIENTISTS & INDUSTRY PRACTITIONERS**

- Interact with professors in seminar-style classrooms and engage with peers in out-of-class activities.
- Graduate with an SMU Bachelor and an SMU / Carnegie Mellon University (CML) Master degree in 4 to 4.5 years.

**HIGHLY COLLABORATIVE LEARNING CULTURE**

**FAST-TRACK PROGRAMMES**

## Why SMU School of Computing and Information Systems?

**High Graduate Employability**

92.3% overall employment rate and mean monthly salary of \$5,530 for Information Systems graduates; 92.7% overall employment rate and mean monthly salary of \$6,120 for Computer Science graduates.

**Experiential Learning & Global Exposure**

Apply concepts to real-world projects and be industry-ready graduates with an understanding of global development.

**World-Class Computer Scientists & Industry Practitioners**

Work with faculty on their innovative research, and learn from professionals with diverse experience.

**Highly Collaborative Learning Culture**

Interact with professors in seminar-style classrooms and engage with peers in out-of-class activities.

**Flexible Learning Pathways**

Broaden and deepen your knowledge by combining majors based on your interests and strengths. Fast track to complete your bachelors and masters degree within 4.5 years.

Source: Graduate Employment Survey 2023

**Undergraduate Programmes**

[Download Brochure](#)

**COMPUTING @ SMU**  
**CREATING OUR DIGITAL FUTURE**

Our undergraduate degree programmes train students to become IT professionals who innovate solutions that create value for business and society.

**BACHELOR OF SCIENCE (INFORMATION SYSTEMS)**

**BACHELOR OF SCIENCE (COMPUTER SCIENCE)**

**BACHELOR OF SCIENCE (COMPUTING & LAW)**

**BACHELOR OF SCIENCE (SOFTWARE ENGINEERING)**

**Why SMU School of Computing and Information Systems?**

**High Graduate Employability**

SMU Proost, Professor Timothy Clark said, "In spite of a challenging economic landscape due to the weaker outlook in 2023, we are delighted to observe the continuing high demand for SMU graduates, who have now a wide range of opportunities in securing employment opportunities."

Source: Graduate Employment Survey 2023

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**School of Computing and Information Systems** **Menu**

**Undergraduate Programmes**

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**Multiple Career Pathways**

Tailor your learning journey with flexible combinations of majors and an option to graduate with a master's degree in 4.5 years.

**Experiential Applied Learning**

Apply concepts to real-world projects and graduate with skills and global perspective to excel in the workplace.

<https://forms.office.com/r/v7ETFsB7HT>

# SCIS Value Proposition



## Individual Submission

<https://forms.office.com/r/v7ETFsB7HT>

Importance / Satisfaction





## Commitment

- 1. How can we align our value proposition more closely with customer needs to increase satisfaction?**
- 2. What service quality improvements would have the most significant impact on customer satisfaction?**
- 3. How can we refine our value proposition to foster long-term customer relationships and loyalty?**
- 4. What loyalty-specific service quality standards should we implement to exceed customer expectations?**
- 5. How can we communicate our commitment to customer loyalty throughout our organization?**

# CARE Model Template



## Commitment

being dedicated to a cause, activity



## Action

process of doing something



## Results

expected outcome as consequence of the actions



## Empathy

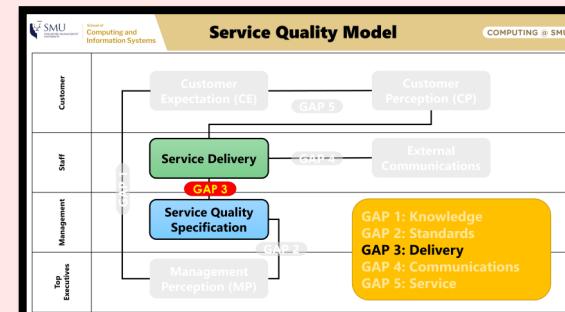
ability to understand and feel what someone else is feeling.

**What is our value proposition?**

**How our solution help(s) the job to be done?**

**What are the experience objectives and key-results?**

**How do my customer is usually feeling when the interaction happens?**



**Service Delivery**



## CARE Model: Action



**Business Process** definition: “Repeatable series of activities performed to deliver a service or a product to a stakeholder”

- Each activity comprises of a **set of logical steps** that is performed by **humans or systems**
- The process **transforms inputs into outputs** according to guidance by **employing resources**
- The process is initiated by one or more **business events**
- The process has **performance indicators** for which **measurable objectives** can be set and performance evaluated



### Action

process of doing something

How our solution help(s) the job to be done?

How – Who – What – When – Why



## Action



- 1. Which touchpoints in our service delivery process offer the greatest opportunity to boost customer satisfaction?**
- 2. How can we empower our frontline staff to take immediate actions that enhance customer satisfaction?**
- 3. What loyalty programs or initiatives can we implement to encourage repeat business?**
- 4. How can we personalize our service delivery to make customers feel valued and increase their loyalty?**
- 5. What proactive measures can we take to prevent customer churn and maintain loyalty?**

# CARE Model Template



## Commitment

being dedicated to a cause,  
activity



## Action

process of doing  
something



## Results

expected outcome as  
consequence of the actions



## Empathy

ability to understand and  
feel what someone else is  
feeling.

What is our value  
proposition?

How our solution  
help(s) the job to be  
done?

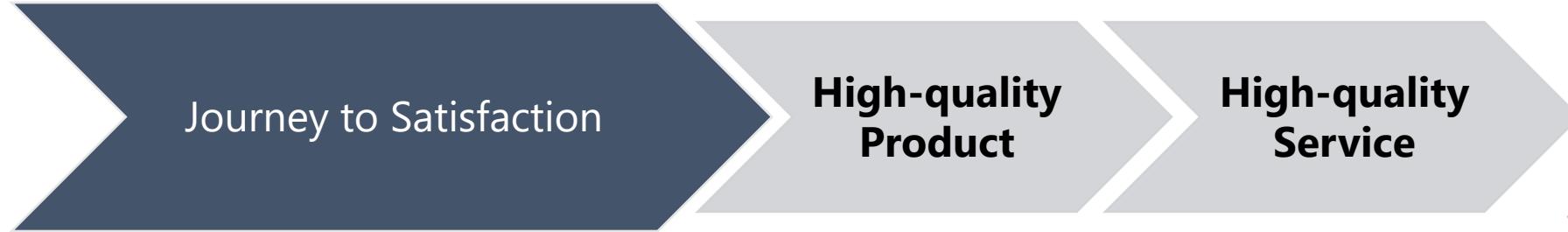
What are the  
experience objectives  
and key-results?

How do my customer  
is usually feeling  
when the interaction  
happens?

**Metrics and  
Sensors**



## CARE Model: Results



- How do you know you are providing **the value proposition**?
- What are the experience objectives and key-results?

- **Quality Metrics** above industry average
- **Service Metrics** above industry average

### Results

expected outcome as consequence of the actions

**What are the experience objectives and key-results?  
(Metrics/Sensors)**



## Results



- 1. What metrics best reflect changes in customer satisfaction levels?**
- 2. How can we effectively use customer feedback to drive continuous improvement in satisfaction scores?**
- 3. Which metrics best indicate customer loyalty trends in our business?**
- 4. How can we measure the lifetime value of our loyal customers?**
- 5. What benchmarks should we set for customer retention and loyalty improvement?**

# CARE Model Template



## Commitment

being dedicated to a cause,  
activity



## Action

process of doing  
something



## Results

expected outcome as  
consequence of the actions



## Empathy

ability to understand and  
feel what someone else is  
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What is our value  
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How our solution  
help(s) the job to be  
done?

What are the  
experience objectives  
and key-results?

How do my customer  
is usually feeling  
when the interaction  
happens?

**Caring Service  
Journey Maps**

# Recall Caring Person



## CARE Model: Empathy

**Customers** are satisfied whenever they consistently receive, in a timely fashion, high-quality service



### Empathy

ability to understand and feel what someone else is feeling.

How do my customer is usually feeling when the interaction happens?

# Tool Exploration

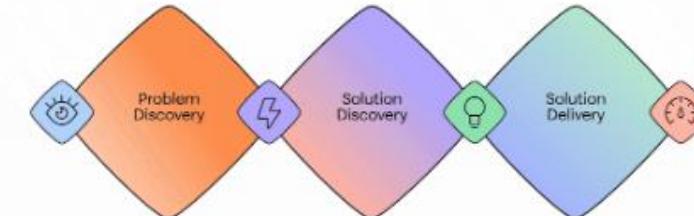


[www.smaply.com](https://www.smaply.com)

The screenshot shows the Smaply homepage with a dark blue header. The header includes the Smaply logo, navigation links for Features, Pricing, Enterprise, Resources, Contact, and buttons for Log in and Sign up. Below the header, the main heading reads "Fast, flexible, and powerful customer journey mapping". A subtext below it says "Optimize every customer touchpoint with Smaply. Turn insights into actionable strategies that deliver improved customer and business outcomes." At the bottom of the page is a red button labeled "Get started for free" with the text "No credit card needed".

The screenshot shows the Smaply dashboard under the "Customer Journey Maps" section. The dashboard has a sidebar with options for Dashboard and Workspace. The main area features a large yellow hand icon pointing towards three buttons at the bottom: "+ New journey", "+ New persona", and "+ New metric".

## The Triple Diamond in short



The Triple Diamond originates from service design thinking and describes how customer-centric innovation takes place. It consists of 3 main parts:

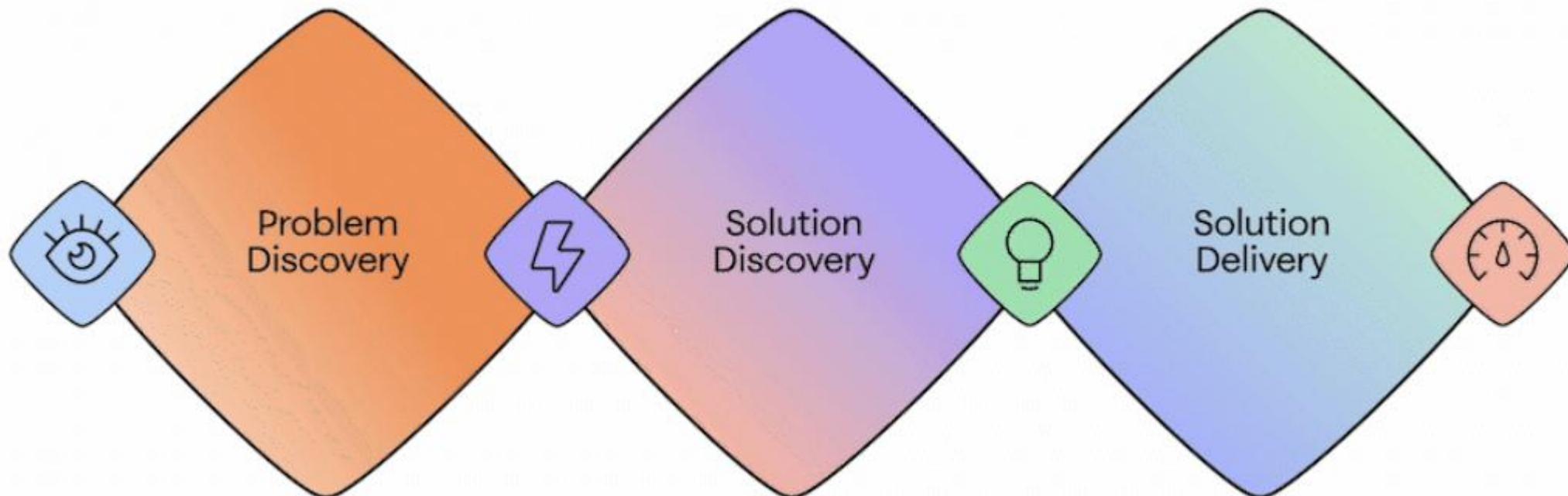
- **Problem discovery:** Identifying the core problems to solve, by researching the current customer experience.
- **Solution discovery:** Defining how to address the core problems, by using idea generation and validation.
- **Solution development:** Implementing the prioritized Solutions and measuring their impact.

Each phase is represented by a diamond shape, emphasizing the need for divergent and convergent thinking at different stages.



## AI in Customer Journey Maps

CARE Model – How to design the experience





## Empathy

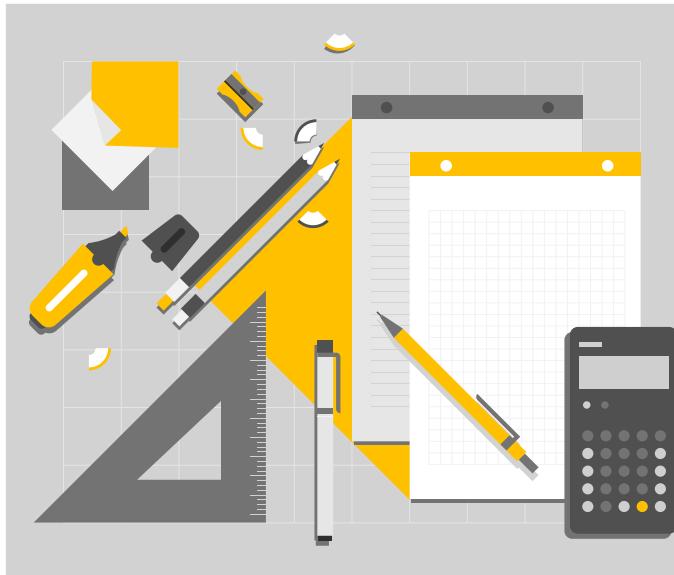


- 1. At which touchpoints do customers experience the most emotional impact?**
- 2. How can we better understand and address customer pain points?**
- 3. What training can we provide to our team to enhance empathy in customer interactions?**
- 4. How can we better anticipate and address customer emotions at key moments in their journey?**
- 5. What strategies can we implement to ensure our team consistently demonstrates empathy in customer interactions?**

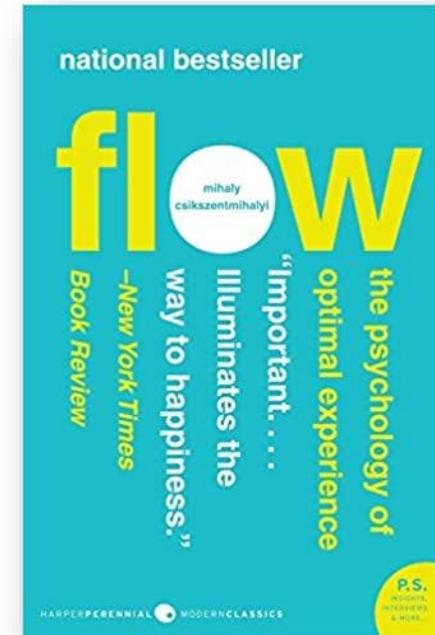
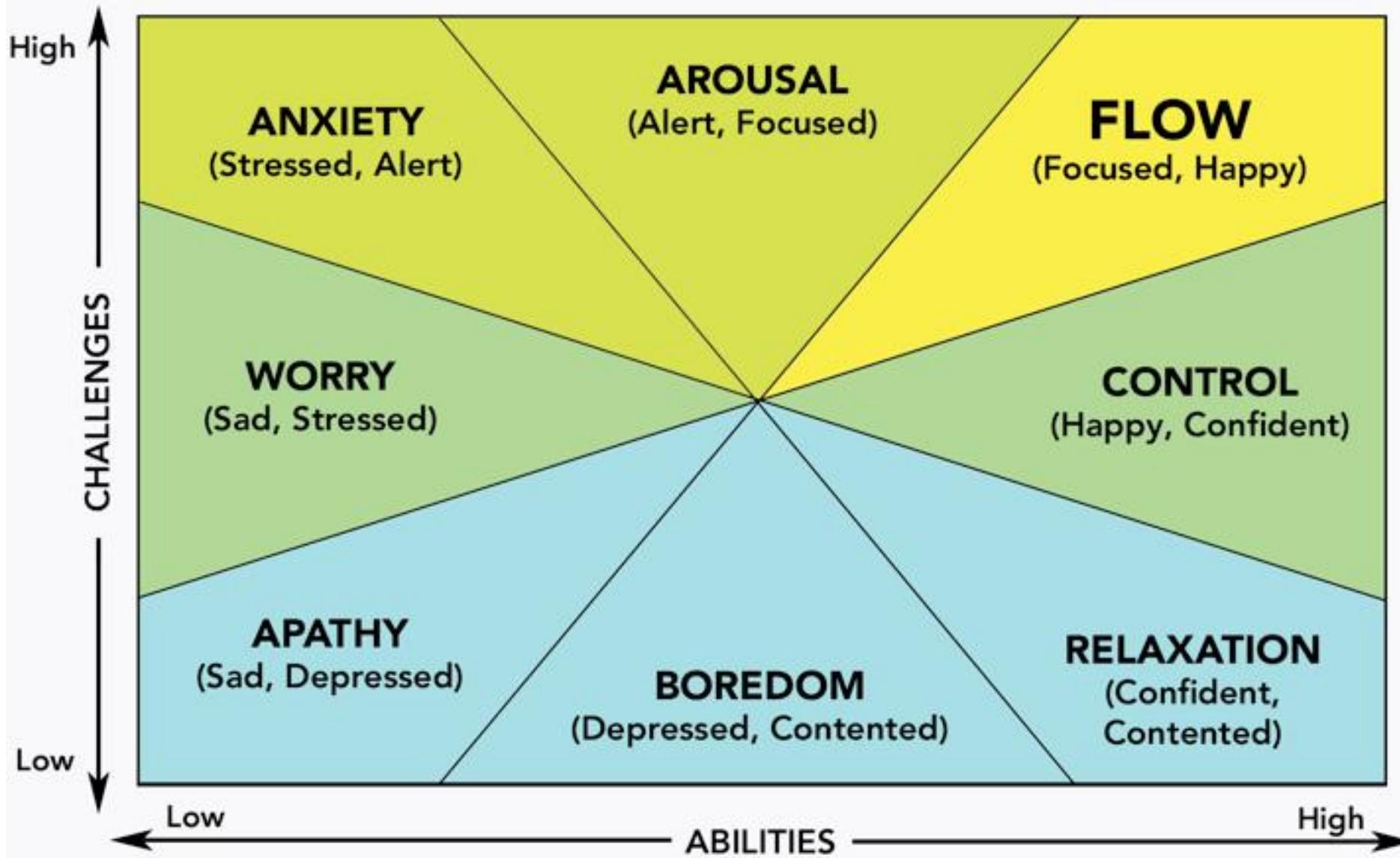


## Other Service Model

- **CARE** Model – How to design the experience
- **FLOW** Model – How to live the experience

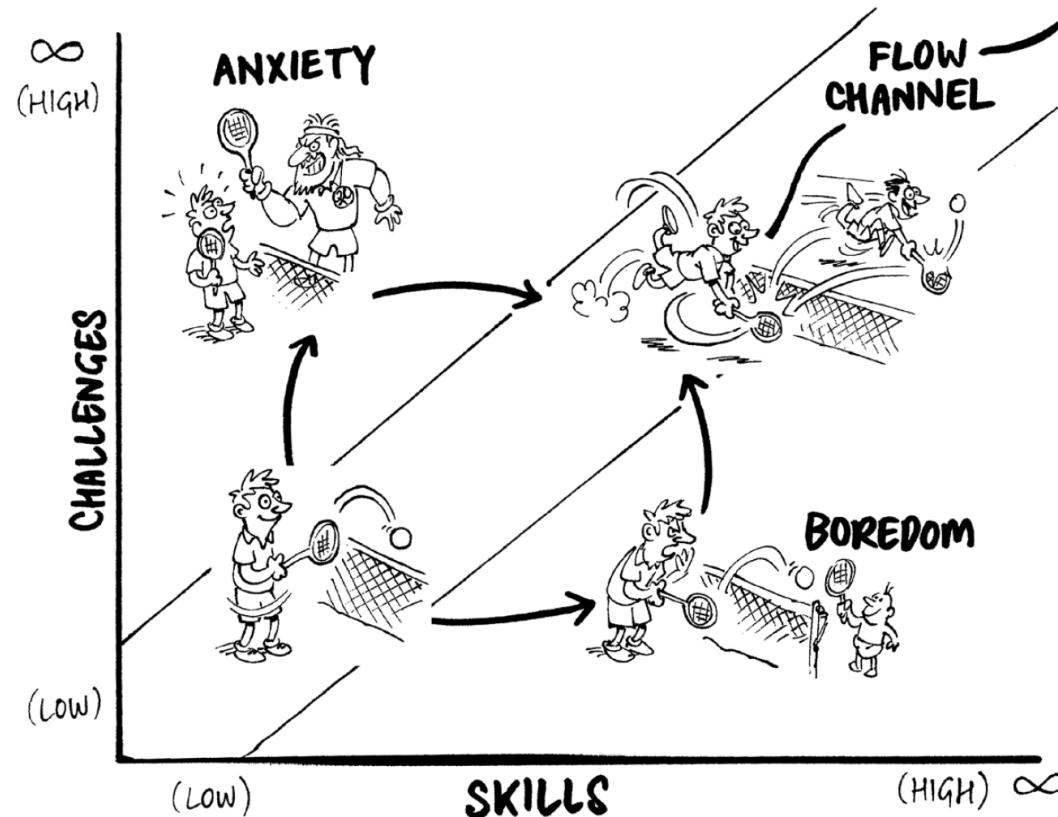


# Flow Model (version 1)



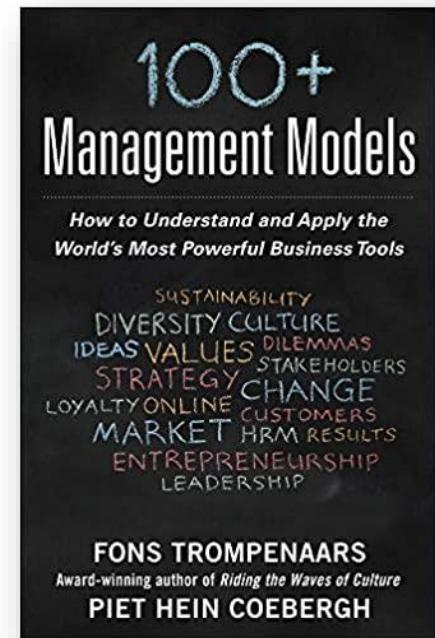
# Flow Model (version 2)

MODEL 8: Flow, Mihaly Csikszentmihalyi (1975)

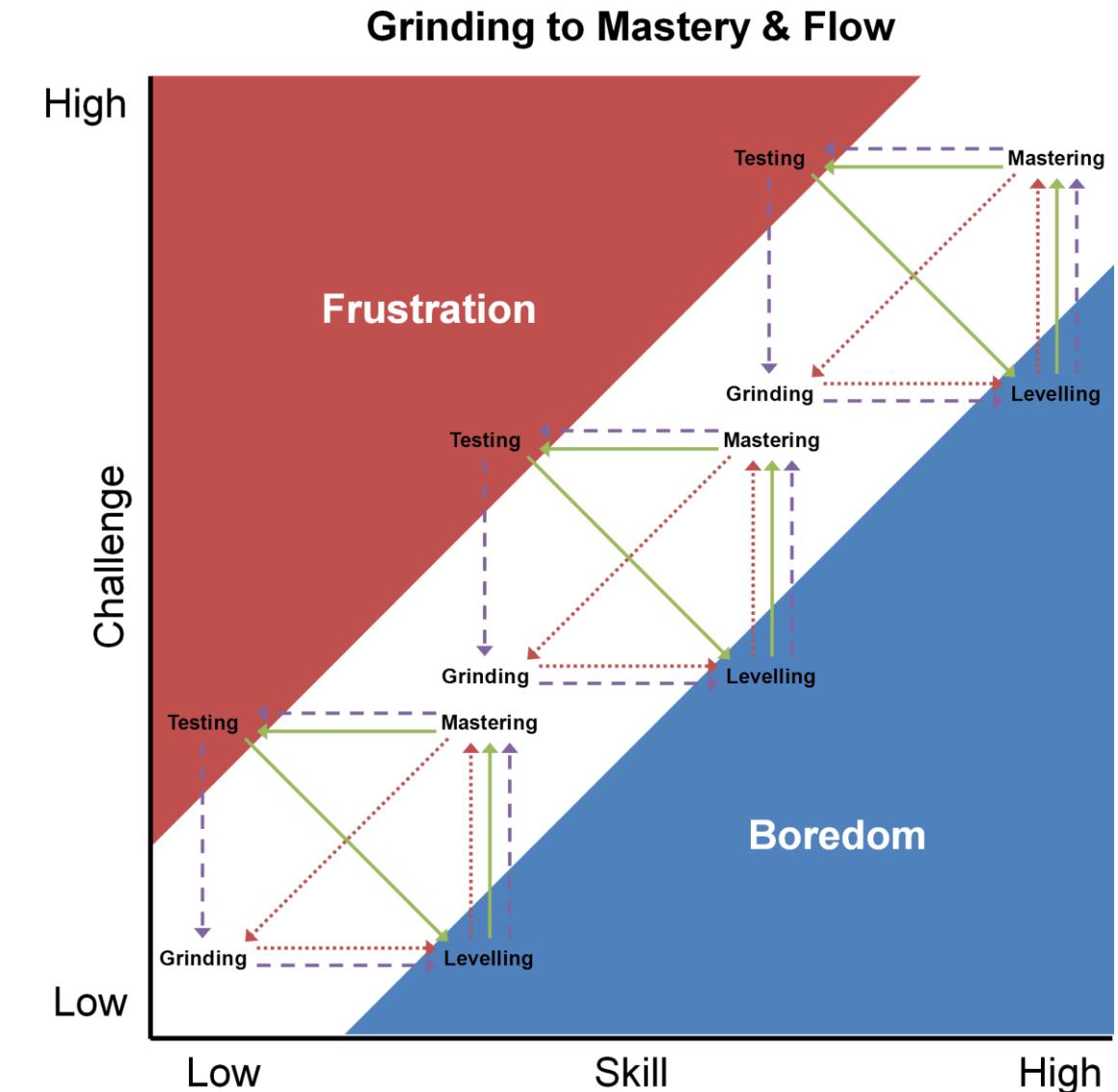
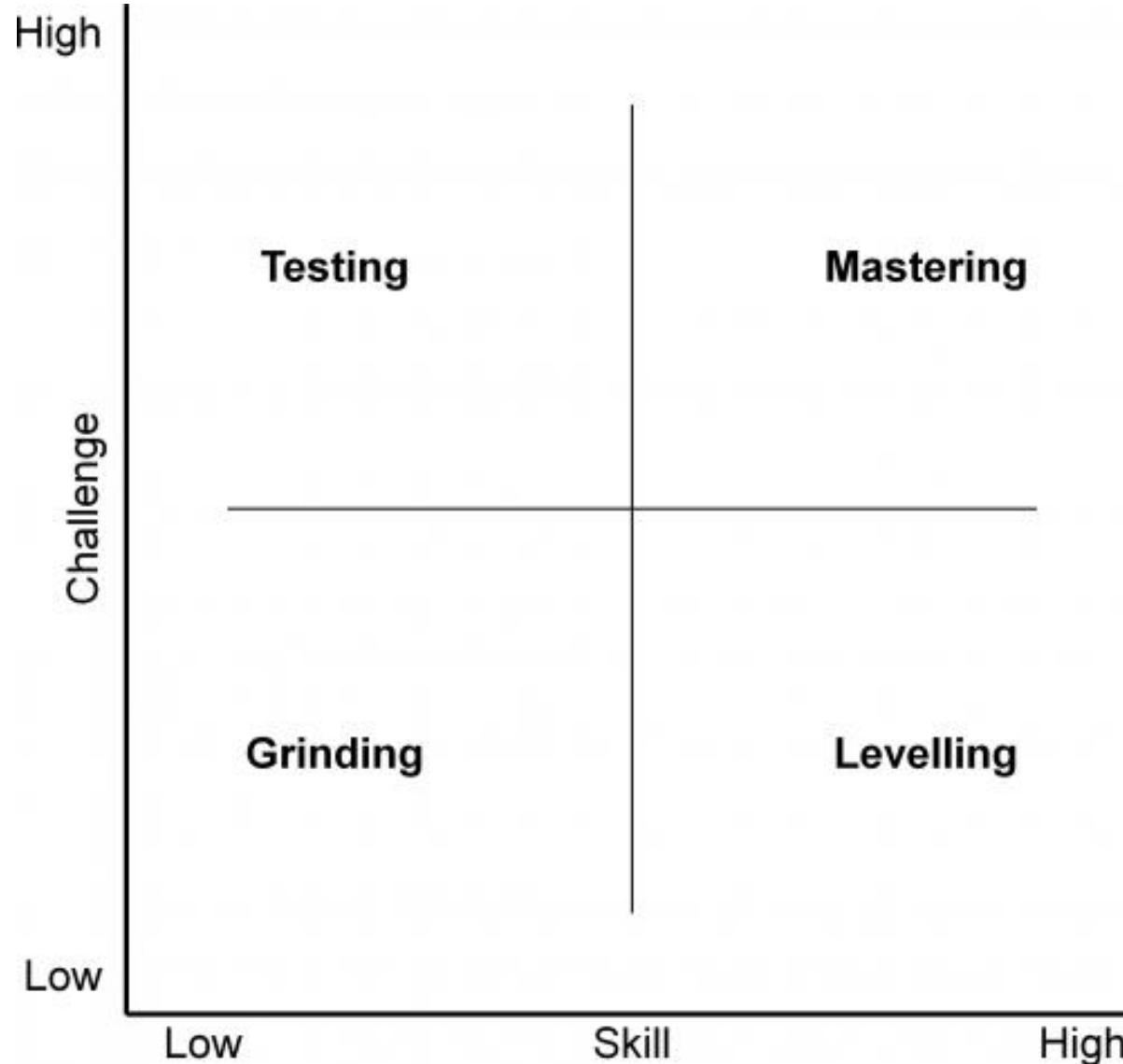


## PROBLEM STATEMENT

When do people feel most happy in their work?



# Flow Model (version 3)





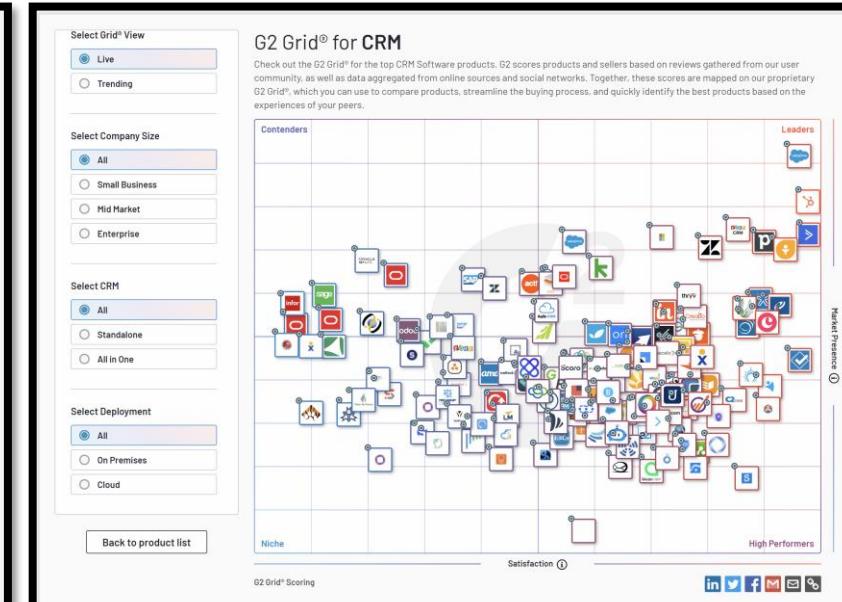
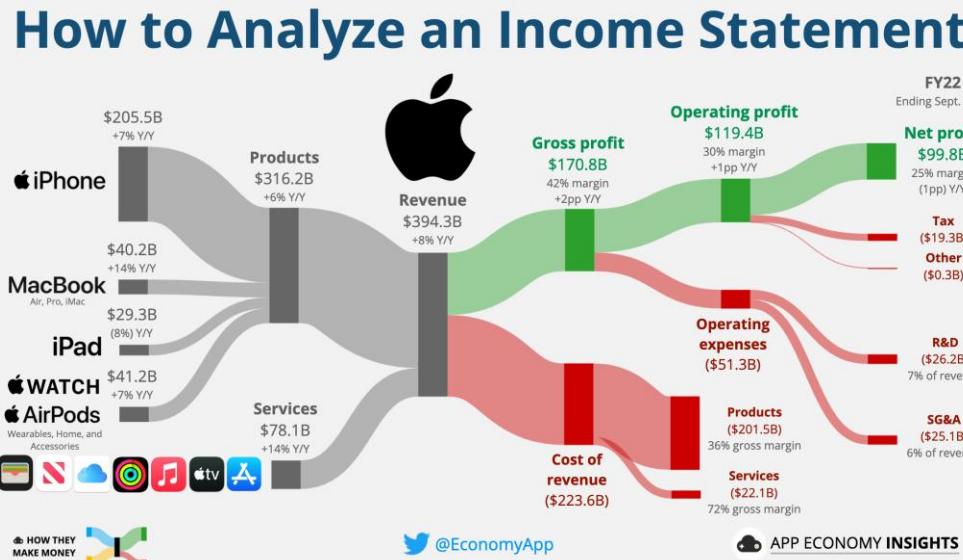
# Metrics and Sensors

## **Internal metrics/sensor**

## (Manage by the organisation)

## **External metrics/sensors**

(Manage by others)



# You Manage



## Internal Sensor

### Choosing Your Metrics

**Time:** 10 min | **Team:** 2-3 students

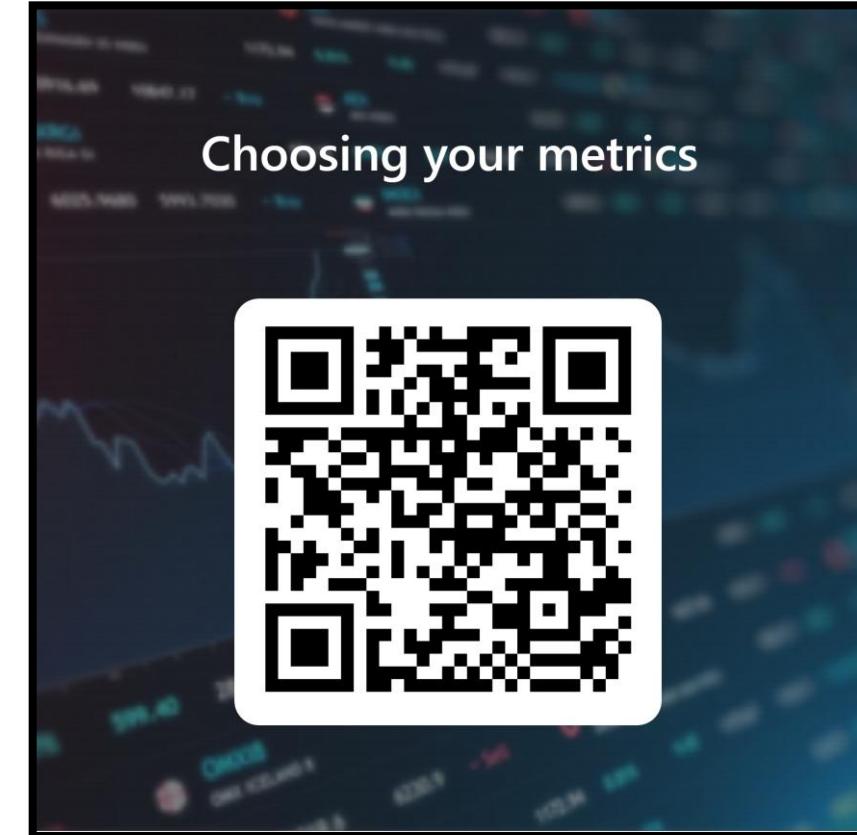
#### Task:

Identify **2+ metrics** for measuring **consistent quality & service** in:

- **1 Retail industry**
- **2 Service industry**

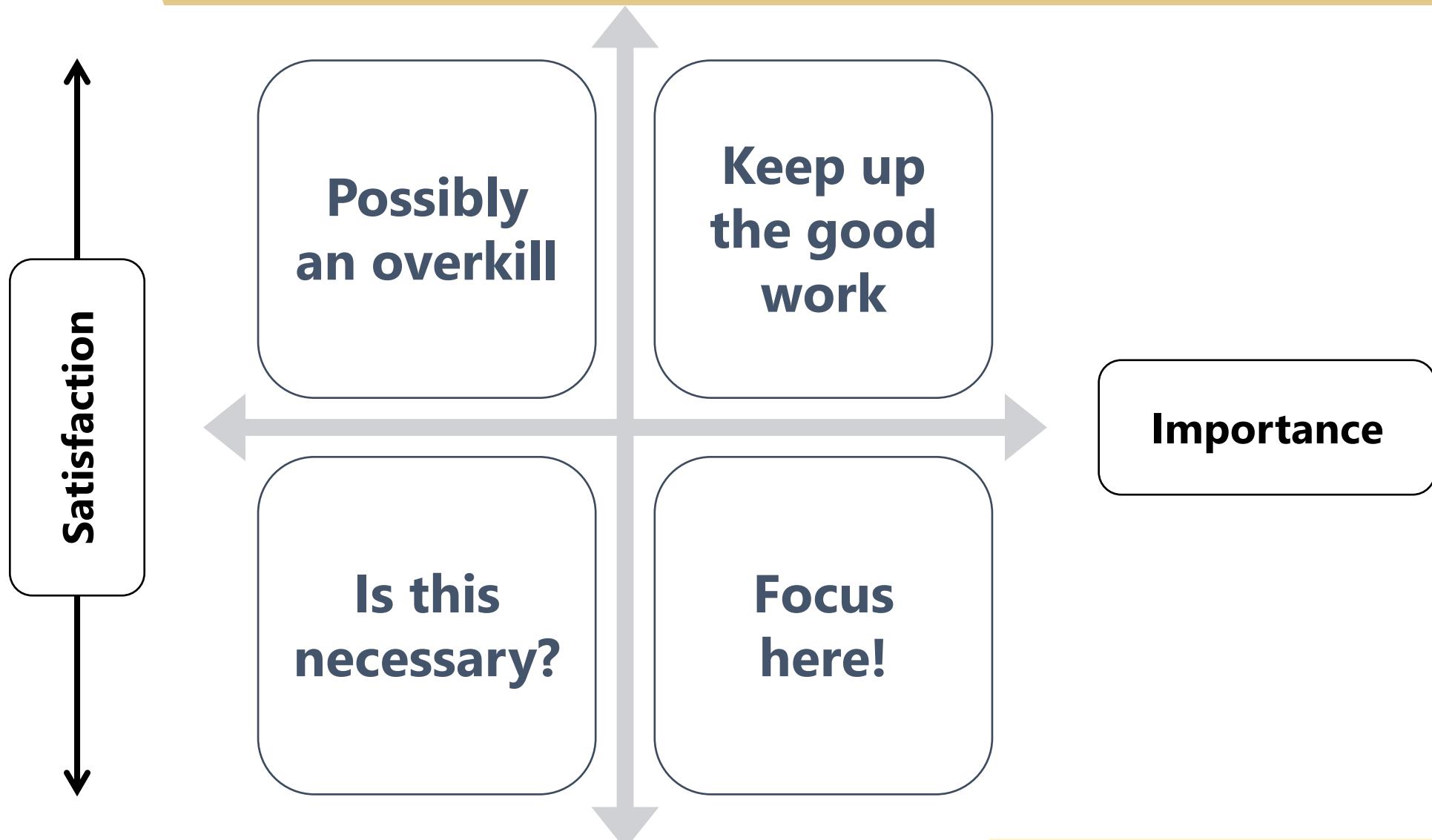
#### Think About:

- What defines high-quality product/service?
- How do businesses measure it?
- Are your metrics useful for decision-making?
- **Be clear, be strategic**



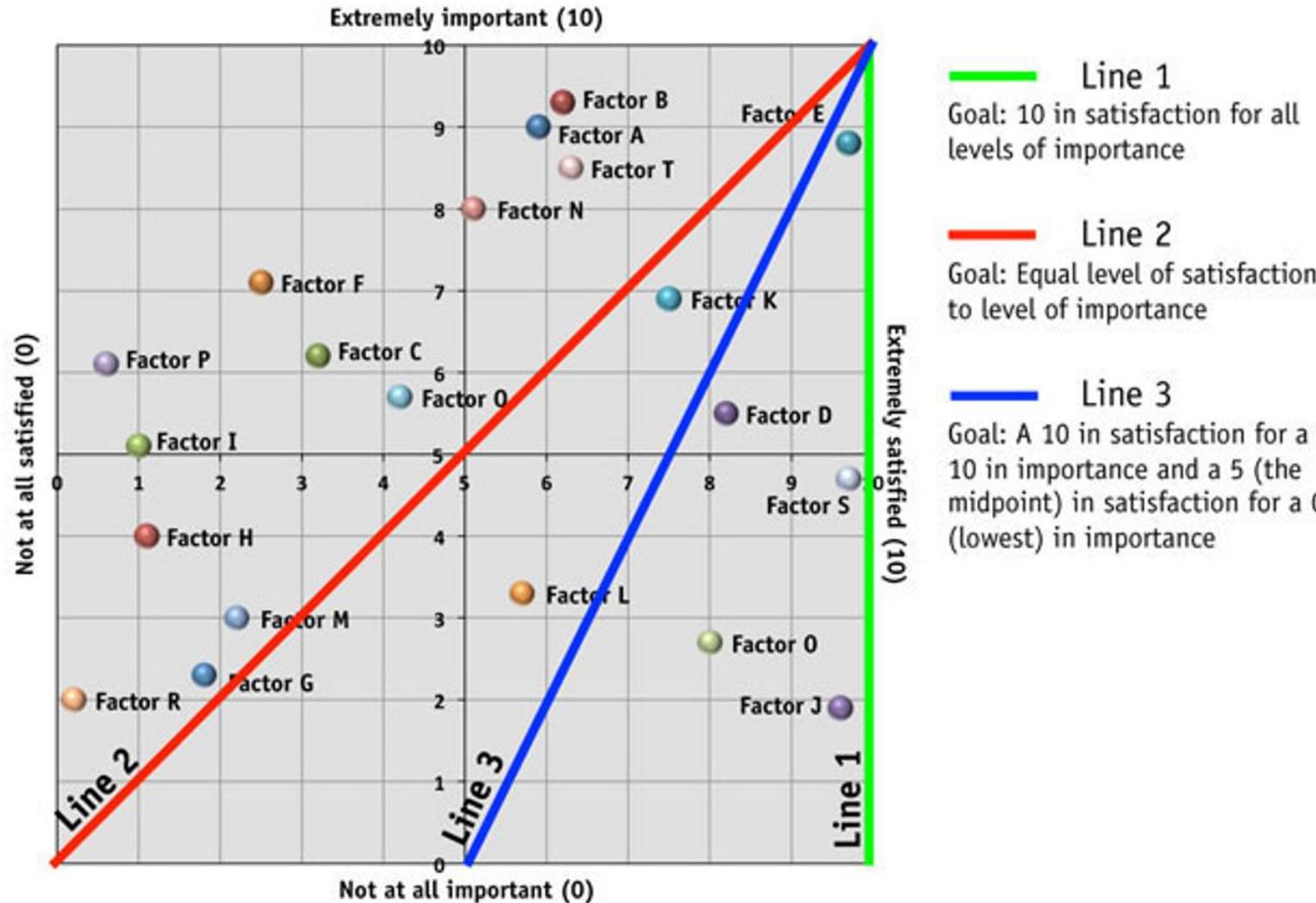
Complete the form at:  
<https://forms.office.com/r/XFv2fQ8AwN>

# Importance/Satisfaction Analysis



For consistency we use the Satisfaction as the Y-Axis

## Improvement Gap Evaluation Options



**Improve the factor with the biggest positive gap**

**Improve/remove the factor with the lowest importance**

**Analise the factor with the lowest negative gap**

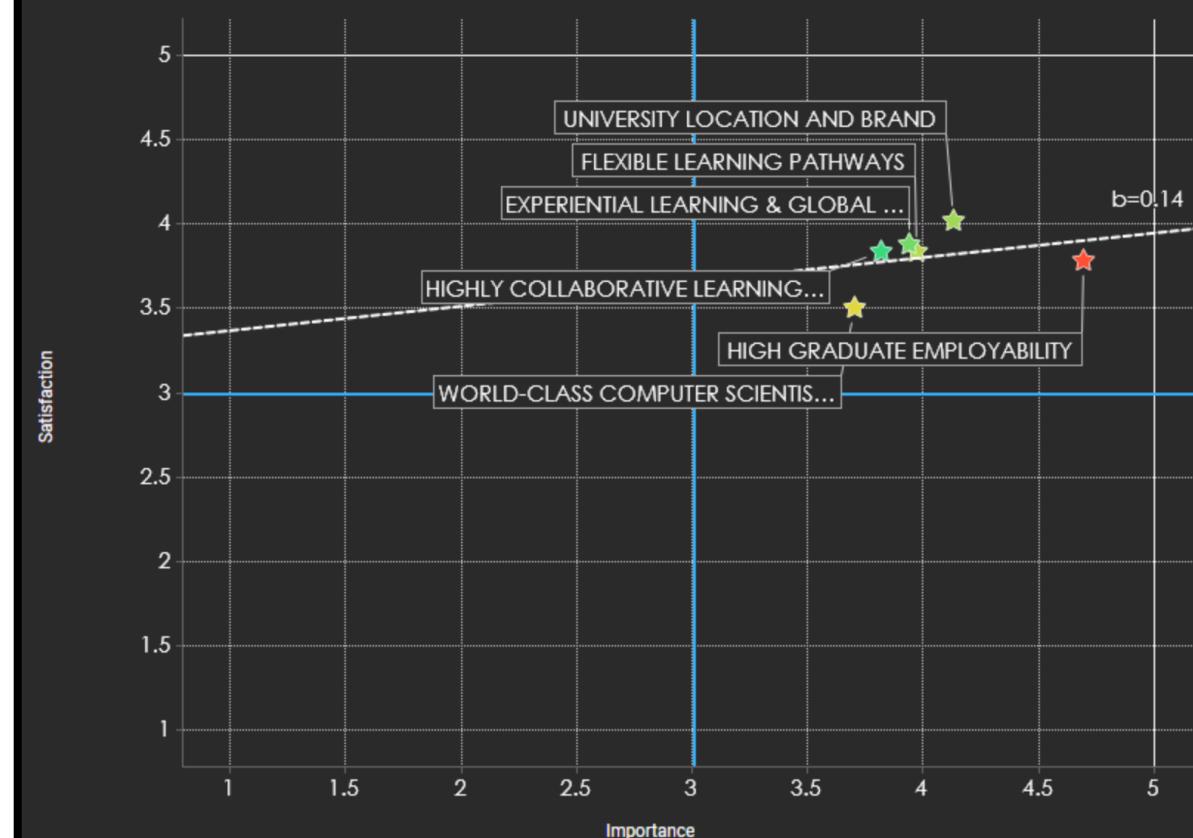
Category	Importance		Satisfaction		GAP	
	2023	2024	2023	2024	2023	2024
HIGH GRADUATE EMPLOYABILITY	4.68	4.70	4.05	3.78	0.63	0.91
WORLD-CLASS COMPUTER SCIENTISTS & INDUSTRY PRACTITIONER	3.65	3.70	3.50	3.51	0.15	0.20
FLEXIBLE LEARNING PATHWAYS	3.33	3.97	3.39	3.83	-0.06	0.14
UNIVERSITY LOCATION AND BRAND	4.22	4.13	4.03	4.02	0.19	0.12
EXPERIENTIAL LEARNING & GLOBAL EXPOSURE	3.76	3.94	3.71	3.88	0.04	0.06
HIGHLY COLLABORATIVE LEARNING CULTURE	3.79	3.82	3.76	3.83	0.03	-0.02

- EXPERIENTIAL LEARNING & GLOBAL EXPOSURE ● FLEXIBLE LEARNING PATHWAYS ● HIGH GRADUATE EMPLOYABILITY
- HIGHLY COLLABORATIVE LEARNING CULTURE ● UNIVERSITY LOCATION AND BRAND
- WORLD-CLASS COMPUTER SCIENTISTS & INDUSTRY PRACTITIONER



## Importance / Satisfaction 2024

● Max (0.91) ● Average (0.24) ● Min (-0.02)



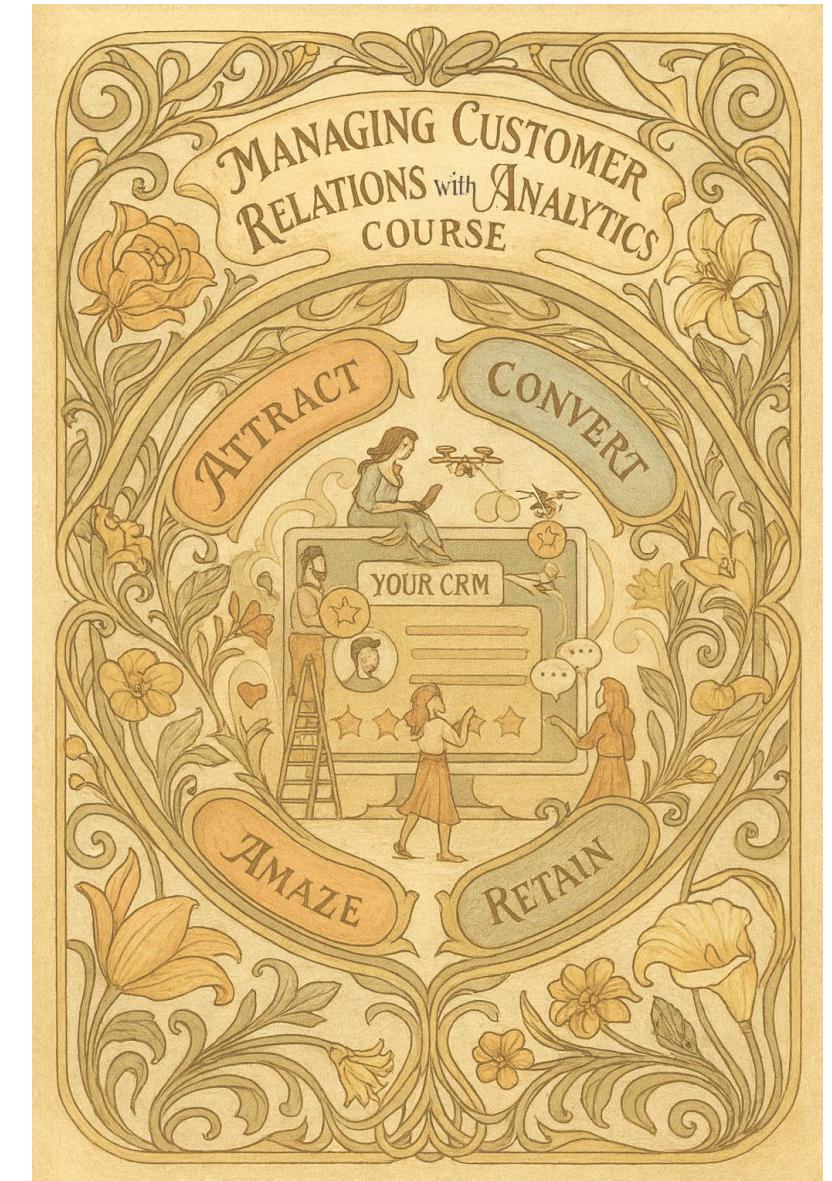
# Agenda

**01** Review / Wooclap

**02** High Quality Service

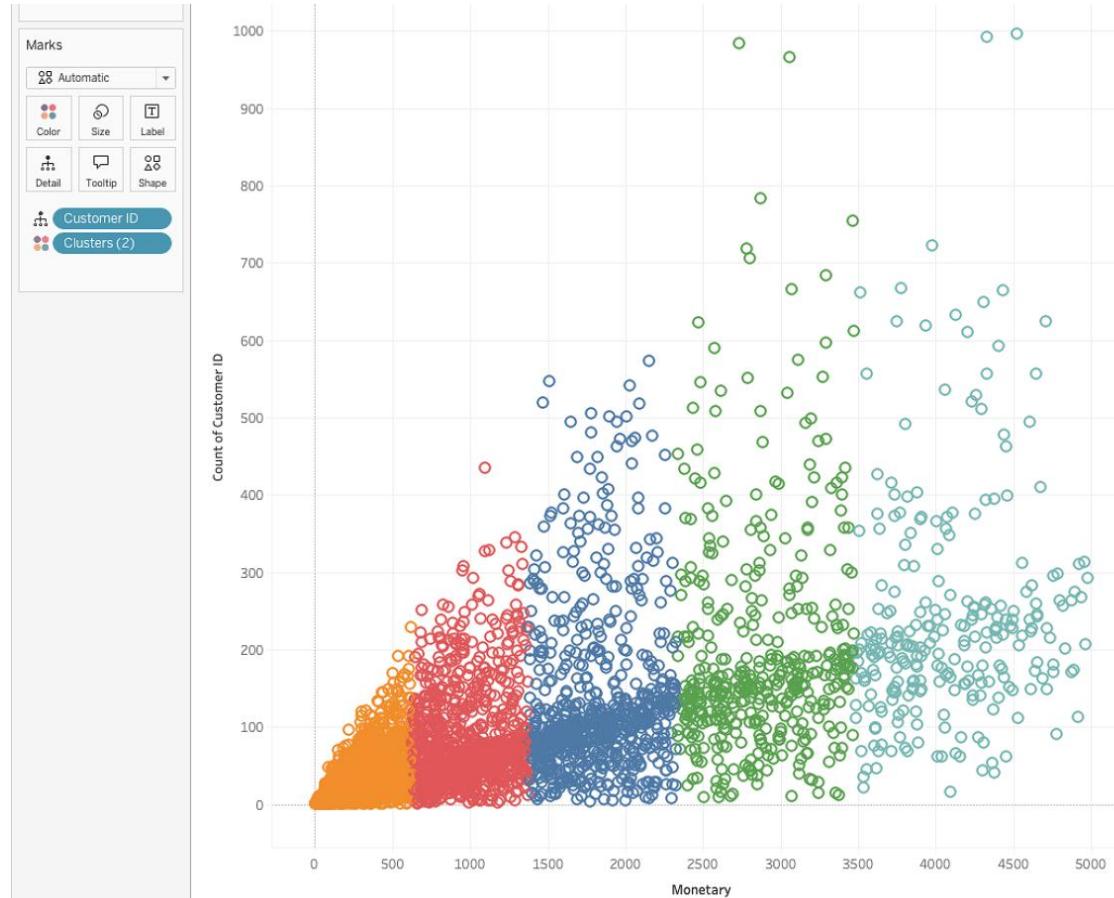
**03** Service Models

**04** Customer Segmentation 





## Who are our best customers?



**Audience (A): Service team**, whose primary interest is in identifying loyal and high-value customers.

**Business Question (B):** The service team wants to know **who the most loyal and valuable customers are**. This definition of "best customers" should focus on **long-term loyalty** and **customer value** (including lifetime spend and engagement).

**Category (C):** Since this analysis is looking at past customer behavior to determine loyalty and value, the dashboard will still be **Analytical (Past)**, but with a focus on supporting service-driven decisions. The team might also want to identify patterns to act on proactively.

**Data (D):** Historical purchase data available

**Ethics (E):** Ensure ethical use of customer interaction data, Fair treatment of customers is critical, especially if the service team will prioritize certain segments for attention.

**Formulate (F):** How can we segment customers based on RFM values to identify which ones are **both highly loyal** (frequent, recent interactions) and **valuable** (high spend)?



## Hands-on into Customer Segmentation

- Individually or in pairs, complete the RFM Analysis for User Segmentation Lab. Available at eLearn.
- Individually complete the Lab form.

**RFM Analysis for User Segmentation**

This tutorial aims to apply the RFM analysis for user segmentation, including the following five parts:

1. Data Loading
2. RFM Calculation
3. Recency Plot
4. Frequency Plot
5. Monetary Plot

**A little more on RFM**

RFM (Recency, Frequency, Monetary) analysis is a customer segmentation technique used in marketing to identify groups of customers based on their behavior. It helps marketers understand which customers are most likely to respond to promotions or have the highest lifetime value. RFM segments customers by examining:

- 1. Recency (R): How recently a customer made a purchase. The assumption is that customers who purchased recently are more likely to make another purchase.
- 2. Frequency (F): How often a customer makes a purchase. Customers who buy more frequently are often more loyal and valuable.
- 3. Monetary (M): How much money a customer spends during their purchases. Higher spending indicates more valuable customers.

**Definition of RFM**

Each of the three variables (Recency, Frequency, and Monetary) is typically scored on a scale (e.g., 1-5), with higher scores representing better customer behaviors (recent, frequent, or high spending). These scores are then combined to create a customer profile that allows businesses to identify high-value customers or target specific segments.

For example, a customer with an RFM score of (5, 5, 5) is considered the most valuable because they purchase often, have bought recently, and spent a lot. In contrast, a customer with a low RFM score (1, 1, 1) would be considered at risk of churn.

**Key References**

[1] Hughes, A. M. (1994). "Strategic Database Marketing". Prentice Publishing Co. - This book introduced RFM as a fundamental tool in database marketing, providing the framework for customer segmentation.[2] Hughes, A. M. (1994).

[3] Fahey, P. S., & Hunter, B. G. S. (2000). "RFM and CD-V Using Two-Value Curves for Customer Base Analysis". Journal of Marketing Research, 42(4), 415-420. <https://doi.org/10.2307/jmra.2000.42.4.415> This paper provides an empirical comparison between RFM and CD-V measures of customer lifetime value (CLV), offering insights into its practical application in various industries.





## CAPS

### Customer Success Video CAPS

<b>Context</b>	You are a team of consultants specialized in Customer Success.
<b>Audience</b>	<b>Senior Management Team at SCIS</b>
<b>Purpose</b>	Deliver a persuasive pitch to convince senior management to adopt your proposed strategies aimed at enhancing undergraduate student satisfaction and loyalty.
<b>Structure</b>	<b>Video Structure</b> <ul style="list-style-type: none"><li><b>Type:</b> Proposal Pitch Video</li><li><b>Duration:</b> 4 minutes (minimum: 3 minutes, maximum: 5 minutes)</li></ul> <b>Submission Instructions</b> <ul style="list-style-type: none"><li>Upload your video to your team's private channel on Microsoft Teams.</li><li>Deadline: Submit at least 24 hours before the scheduled class in Week 13.</li></ul>

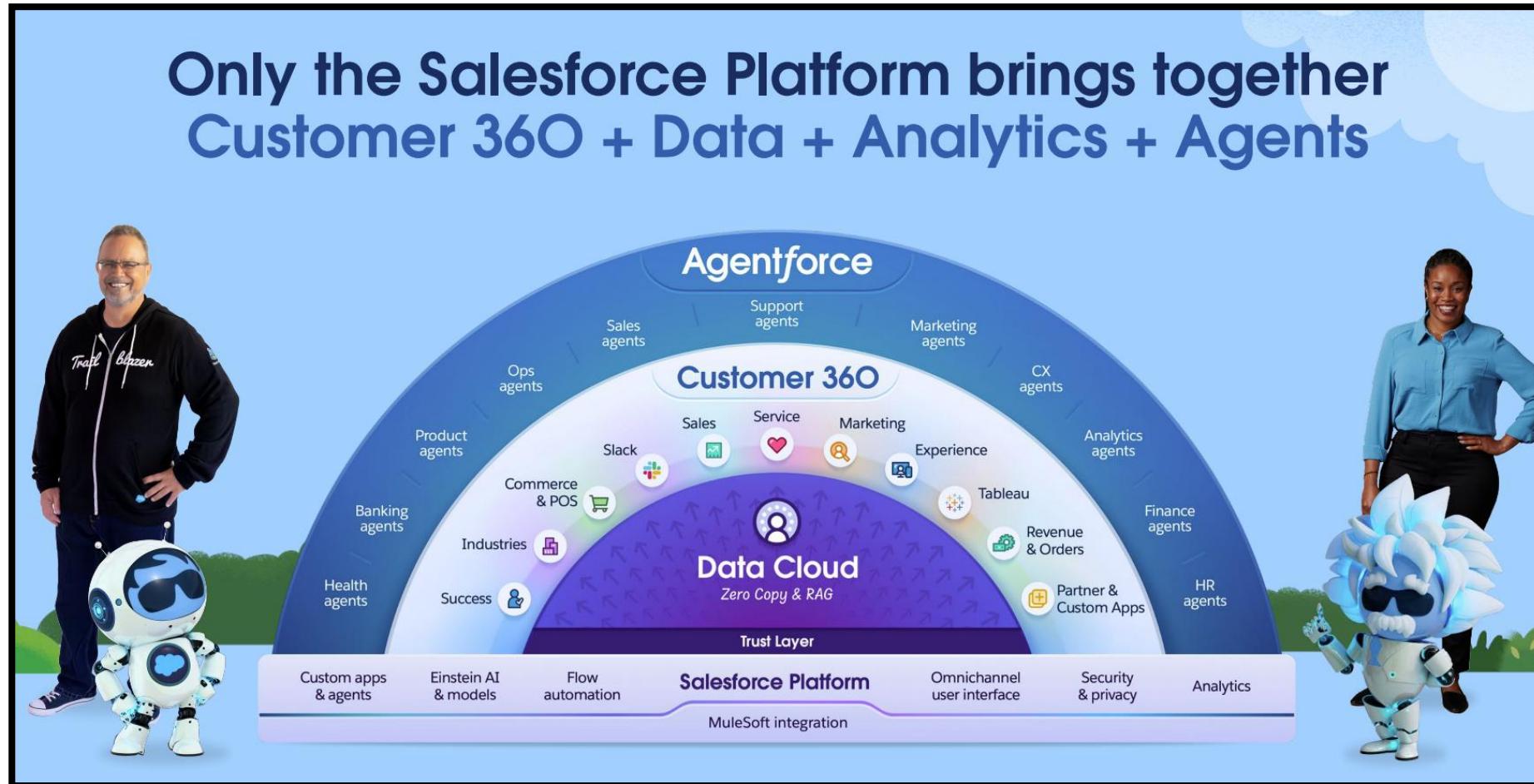
### Customer Success Technical Presentation

<b>Context</b>	You are a team of consultants specialized in Customer Success.
<b>Audience</b>	<b>Faculty and fellow classmates.</b>
<b>Purpose</b>	Conduct a live technical presentation demonstrating: <ul style="list-style-type: none"><li>Your team's Customer Journey Map</li><li>Interactive dashboards</li><li>Customer Success management strategies</li></ul>
<b>Structure</b>	<b>Live Presentation Structure</b> <ul style="list-style-type: none"><li><b>Type:</b> Live demonstration</li><li><b>Duration:</b> 10 minutes</li></ul> <b>Presentation Instructions</b> <ul style="list-style-type: none"><li>All team members must actively participate.</li><li>Provide a live demonstration of your Tableau Story to illustrate and support your strategies.</li><li>Clearly present and explain your Customer Journey Map.</li></ul>

# Salesforce Update



## Agentforce





## Participation Points

- **We love to read your reflections on what we covered in our session today.** Taking a few moments to do this each week is a powerful learning tool.
- **It helps you grow:** Regularly reflecting helps sharpen your analytical skills, organize your thoughts, and spark new creative ideas.
- **It helps our class:** Your feedback is incredibly valuable and helps us improve the course for you in real-time.
- **It's part of your grade:** Timely submissions count toward your participation grade.
- **Short URL:** <https://forms.office.com/r/kRb8vniULD>

IS446 - MCRA Reflections  
(AY202526-T1)

