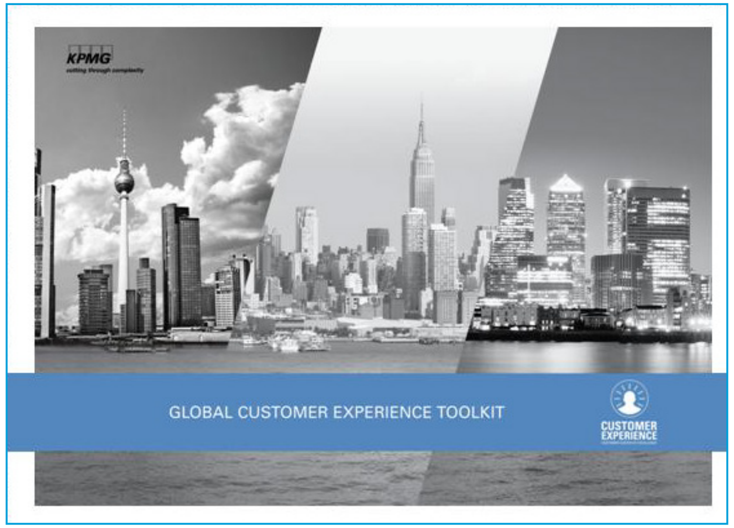
The Toolkit

"There is only one boss. The customer. And he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else."

Sam Walton
Founder of Wal-Mart



This is the Customer Experience Toolkit developed by the KPMG Global Customer Centre of Excellence . It is an accelerator to support client facing teams win complex and challenging customer experience related engagements, and to support our delivery teams on the ground by equipping them with a proven approach, templates and tools.

THE TOOLKIT section provides information about its purpose and its context with other topics that fall within the scope of 'customer' at KPMG. **OUR WORK IN THIS SPACE** provides interesting credentials to support sales and marketing teams in winning further work. **INSIGHTS** capture our point of view of customer experience and why our clients should pay attention to the subject. It provides a summary of our unique capabilities, approach and offering. The **DELIVERY** section is the home of our detailed approach and sets out a logical step by step guide to solving our clients customer experience challenges. Finally, the **SKILLS & CAPABILITY** section summarizes the typical roles to be found on a customer experience engagement and provides guidance as to the team mix and size over time.

This toolkit, version 1.01 dated February 2015,

Customer Centre of Excellence Proposition Framework

At KPMG we have a holistic view of how we transform a business. This toolkit is one of the key propositions developed by the KPMG MC Customer Centre of Excellence to address our clients key issues.

Strategy & Vision
- Growth Strategies
- Innovation
- Customer Experience Transformation

Transformation Components
- Omni-Channel Design & Delivery
- Marketing Transformation
- Sales Transformation
- Service Transformation

Enablers
- Customer Data & Analytics
- Customer Centric Culture
- Digital Social Mobile
- Customer Centric Platforms & Applications

Operations
- Business Services

We define Customer Experience (CX) as the sum of all experiences a customer has with a supplier of goods and/or services, over the duration of their relationship with that supplier. This can include awareness, discovery, attraction, interaction, purchase, use, cultivation and advocacy.

- The Toolkit
  - Scope
  - Purpose
  - Client Needs Identification Tips
  - Notes on Risk
  - Engagement Pre-requisites
  - Hints & Tips
  - Owner
  - Key Contacts
- Our Work In This Space
- Insights
- Delivery
- Skills & Capability

Target Audience of this Toolkit

This toolkit is intended for use by management consultants working within the 'Customer' (or similarly designated functions) within KPMG.

The toolkit contains a series of initial overview and sales-related material to assist Business Development Managers, Client Lead Partners, and senior market-facing individuals in supporting and framing the capabilities of the firm in response to market demand for customer experience related engagements.

The toolkit has a detailed method which is intended for use by experienced customer consultants in the field. The method has ready to use templates, guidance and tips to accelerate the design and delivery of a customer experience engagement.

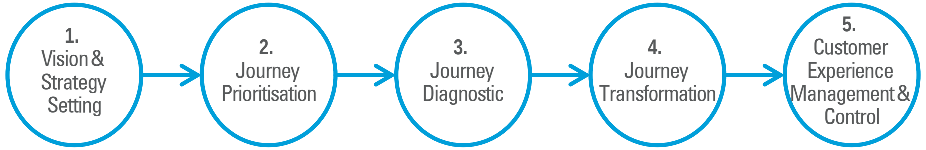
When to use this toolkit

This toolkit (and in particular the method) should be self explanatory, and has been developed such that consultants with limited prior experience of CX design and delivery can come up to speed with the concepts and to understand how best to apply the method to their client situation.

NOTE: There are technical elements of this toolkit that we would recommend be led by seasoned practitioners. The Customer Centre of Excellence has a database of global CX professionals ready and willing for you to tap into should the need arise.

CX Method

Our approach is summarized in the following steps and can be found in the Delivery section of the toolkit...



Defining our customer experience aspirations

Targeting areas with maximum value

Understand what customers value the most

Building solutions to maximize the customer experiences

Continuing to improve the customer experience

Who	Why	What section of interest
Business Development Managers	To assist in framing response to market demand and showcasing KPMG capabilities	Point of View | Client need identification tips | Credentials | Client references | Link to relevant insights & data
Client Lead Partners	To assist in framing response to market demand and showcasing KPMG capabilities	Point of View | Client need identification tips | Credentials | Client references | Link to relevant insights & data
Market-facing partners, directors and senior staff	To assist in framing response to market demand and showcasing KPMG capabilities	Point of View | Client need identification tips | Credentials | Client references | Link to relevant insights & data
Bid Manager	To accelerate the development of a bid using a pre-defined and proven methodology. To provide realistic views of effort and workplans. To access tools and template examples to showcase our technical capability	Delivery | Link to Methods and tools | Sample proposals | Credentials |Engagement Prerequisites
Engagement Manager	To accelerate the set up and delivery of a structured CX programme	Delivery | Link to Methods Relevant Tools | Sample proposals | Credentials | Case studies | Engagement Prerequisites
Engagement Consultants	To improve the knowledge of the subject and to provide reassurance that this is s tried and tested method	Delivery | Link to Methods Relevant Tools

The Toolkit > Client Needs Identification Tips

Keywords to look out for in client conversations

The following keywords are ones that may signal an interest by the client or an opportunity to discuss in more detail. In some cases it will be because of a genuine need by the client (see symptoms below), or may be due to increase in media coverage of the topic.

> Journey mapping | customer dissatisfaction | salesforce performance | customer service | real time customer feedback | end to end customer experience | digital experience | cross-channel experience

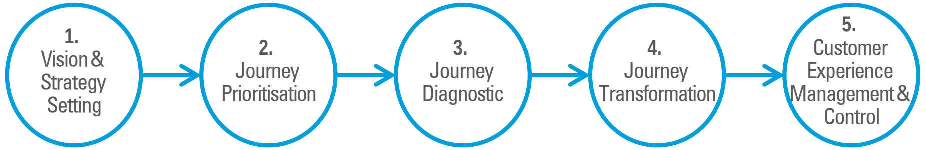
Symptoms of need

If your client expresses the following symptoms...

- No clear view of how customers interact with the organization
- Unsure of where costs are leaking or what moments of truth cost more for the organization
- Unsure if the organization is spending money on activities that don't add a great deal of value for customers
- Lack a holistic end to end view of customer touch points
- Unsure of the true motivations of customers and what it will take to shift those behaviors
- Lack of a clear view of what a future customer experience could look and feel like
- Concerned that decisions about customers are being taken in the absence of or with limited up to date customer feedback
- Unclear of what's important to customers

The Remedy...

Our approach to address these symptoms is summarized in the following steps (and is provided in more detail within the Delivery section of the toolkit)...



This toolkit, version 1.01 dated February 2015, is currently in Alpha stage of development. This means that the toolkit has been developed and reviewed but not yet tested out with users.

The credentials provided in this toolkit, including client names and all details, are **CONFIDENTIAL** and have been supplied in good faith by the Member Firm from whom the engagement originated. The client name and details of the engagement are supplied for information purposes only, and should not appear in any external bids, marketing or other activity. To discuss using this credential for any activity, please seek the express permission of the contact listed.

Foreword

Firstly, it is important to clarify that for a Customer Experience engagement there are no set in stone prerequisites. There are items of data and understanding that would help facilitate an engagement, which will be described below.

'Outside-In' view

KPMG can conduct high level 'Outside-In' analysis to get the measure of the client needs and issues from high level, shallow dive experience conveyance to detailed Web analysis using MOBI.

Team member experience

Harnessing the client alumni networks KPMG employ, project teams can use tools including Customer Experience networks of contacts and MySite to make contact with colleagues who may have inside expertise in the client that we are delivering to.

Barometer

Outputs from KPMG's leading thought leadership, the Customer Experience Barometer, can add insight into a project team's understanding of client and industry issues, client positioning and customer experience feedback. This can act as a guide to initial stages of the project adding insight into hypothesis that can be tested at early stages once client information has been provided.

MOBI analysis

MOBI has advanced capabilities for data acquisition and procession to acquire new content quickly and adapt to high-volume/high-frequency data bursts. This includes: Focused Deep Site Crawlers to find Web content, Machine Learning Enabled Scraping to parse the Web content into semi-structured data, Real-Time Stream Content Processing to categorize the data, and Smart Burst Data Management to handle the challenges of real-time processing. This connects to an overall philosophy of using the Web as a database, tapping into a wealth of information that can be transformed into downstream value.

Understanding industry drivers

A key step in engaging in Customer Experience projects is to have a degree of knowledge into the current state industry drivers; that is those that have influence over what the client's objectives are and the landscape that is driving those.

Strategy: By understanding the strategic aims of the industry from analyst insight and expert input, it will allow consultants to understand the motives of the C-Suite and others to commission Customer Experience work in this industry.

Market Reporting

Trends in the market relating to key industry drivers could add useful information to the first weeks of a programme as it offers immediate insight into market needs.

KPMG PoV

KPMG's market teams offer weekly and monthly updates from industry experts. These can be found by accessing the Global Intranet and signing up to updates. These also offer a valuable route to key industry SMEs who can offer assistance to understanding industry issues.

Regulation

As the regulatory agenda takes up more C-Suite time than ever before, KPMG can harness global regulatory expertise to get up-skilled and informed quickly so that engagements can hit the ground running with the regulatory insight.

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Understanding client drivers

By understanding what is propelling our client and key sponsors, consultants can begin engagements with informed understanding of the bigger picture and what they are ultimately contributing to

Strategy

This develops upon the understanding of the general industry strategy. By clearly understanding client issues and strategies to meet the future needs of the business, consultants can gauge client hotspots where initial engagement efforts can be focused and needs addressed. Information can be gleaned from 'Outside-In' analysis, or using available materials including Annual Reports and Media Statements.

Who are the customers?

The final level of prerequisite is an understanding of who the client's customers are, so that consultants have a level of data that can be worked with in the first instance to develop solutions. There are ideal and base levels of customer data that is required:

Base	Ideal
• Structured customer records • Contact details of available touch-points • Sales and service data	• Customer segment data • Channel use data

The following insights have been summarized from KPMG's Customer Experience specialists in relation to selling and delivering CX engagements:

Selling CX Engagements

- Bring to the client some specific, practical examples of what has worked well and not so well.
- Executives and Board members have to be bought in to the rationale for undertaking a CX program because it will cut across the entire organization.
- The use of the rapid diagnostic using the CX Maturity Assessment tool can be a great conversation starter and a 'wedge offer' to identify key CX challenges that the clients faces.

Delivering CX Engagements

- Ensuring that the client invests time and resources on their side and that their people are heavily involved is key to ensuring the project is a success.
- Data quality will always be a problem. Make sure that you allocate time and resources to cleanse data before using them in your analysis.
- Observation can give amazing insights but only when it is supported by hard data, otherwise the client may not fully believe in them.
- A hands-on prototype or successful pilot can win over skeptics and gain valuable commitment to sustainable change.
- The moment of truth is not a silver bullet that has potential to fix all issues.
- A client's employees are critical partners for ensuring that the organizations brand promise is delivered at each moment of truth whether it is a front office interaction or a back office service level agreement.

This toolkit has been developed by a global team of customer experience experts and has incorporated best practice methods, tools templates and solutions from the UK, US, the Czech Republic and Australia.

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