

ACHIEVEMENT IN  
CUSTOMER EXCELLENCE



# Winners' Showcase 2021

## The Achievement in Customer Excellence Awards





About the Forsta ACE Awards

The Forsta ACE (Achievement in Customer Excellence) Awards program celebrates outstanding achievement in customer and employee experience. Receiving a Forsta ACE Award demonstrates an organization's rigorous application of Customer Experience best practices, and its outstanding performance as measured by those processes.

The winners' stories in these pages demonstrate how listening to the Voice of the Customer and Voice of the Employee has the power to drive an organization forward, delivering world-class customer and employee experiences, changing business culture, and generating significant Return on Investment.

We're honored to celebrate the people, the teams, and the companies that continually strive for CX excellence. Every year organizations from around the globe prove that listening to the voices of customers and employees is a critical element of success and is what drives the business forward. The winners in this book lead the way in delivering world-class customer experiences, changing business culture, and generating significant Return on Investment. We are thrilled to play a part in their success. I hope the stories in this book will inspire other businesses to reach new heights.

Kyle Ferguson  
CEO, Forsta





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Industries

-  Education
-  Financial Services
-  Insurance
-  Pharma/Healthcare
-  Research/ Business Services
-  Retail/Consumer
-  Technology
-  Travel



# Award Categories

The stars of this year’s awards demonstrate excellence, best practice and achievements in each of the following areas.

## Voice of the Customer

This category recognizes the companies who have developed a strategic approach to listening to customers and are using that voice to drive change. These programs not only capture the Voice of the Customer at key moments of the customer lifecycle, but also translate that voice into action that improves the customer experience.

## Innovation

This category recognizes businesses who are using innovative approaches in their programs. From making use of new data collection techniques to finding new ways to communicate and engage with customers and employees, the winners in this category are doing something a bit different to achieve their goals.



## Business Impact

Any CX program aims to improve and grow the organization, and these winners are doing just that. As well as significant increases in KPIs, the programs highlighted in this category are changing the way these companies do business – in big ways and small.

## Employee Experience

While employee surveys may not be new, the process of building structured programs to gather insight from employees at multiple stages in the employee experience remains the exception rather than the norm. Our winners in this category are listening to employees, acting on their feedback, and building better places to work.

## B2B

Understanding the Customer Experience in B2B organizations is critical given the high-value nature of accounts. In this category, our winners are using their CX programs to really understand complex B2B relationships and are helping their Account Management teams to thrive.

## Digital Success

A digital approach is at the heart of a successful CX program. Winners here have taken their initiatives to the next level, capturing feedback from customers through channels that enhance the digital experience.



The Judges’ Choice awards pays tribute to a company that has distinguished itself at the highest level in each category.





amadeus



**“The unwavering support of our customers despite the impact to the industry of the pandemic has spoken volumes to the dedication that this company has to customer engagement, improvement and innovation.”**

**Kathleen Townsend**  
Administrator, Shared Services

## Adapting processes to meet rapidly changing customer needs

Amadeus powers travel experiences with solutions for every stage of the traveler journey, and helps hospitality providers acquire, service and retain guests by driving demand. With over 30 years' experience and 17,000 experts in over 175+ countries, Amadeus has a deep understanding of the hospitality industry and a desire to innovate technology that will meet and exceed traveler expectations.

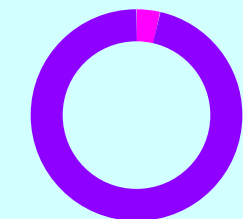
Amadeus runs a global Voice of the Customer program in all countries in which it operates. The global impact of the pandemic required the company to focus on being flexible to changing customer needs, making the VoC program more critical than ever. It allowed Amadeus to maintain high levels of customer service while merging multiple support and delivery teams from a key acquisition.

To achieve this, Amadeus redeployed its training team from in-person to webinars to suit customer needs; built an internal training team to focus on customer experience and resolution of customer issues; reduced the need for customers to conduct pre-work; and implemented automation tools to complete repeatable, low-value tasks. Combined, these initiatives have increased customer satisfaction, relieved customer pressure, increased response times to issues, and ensured all roles focus on the customer.

This approach has driven an increase in revenue margins as implementations take fewer resources to deliver the same value, freeing up around 3600 hours between customer delivery and support. Time to activation (TTA) has also improved, reducing costs to both the customer and the organization. This has had a knock-on effect on Time to Revenue (TTR), increasing customer service quality and driving customer satisfaction.

### Smarter Decisions

- Customer Support Satisfaction increased by 3% year over year, including an increase of 7.5 NPS points
- Company strategy of Becoming One accelerated as teams work together to promote this culture with customers
- Team engagement and morale increased as the reduction in administrative tasks allows focus on delivering value to customers.

**3%**

YOY Increase is Customer Support Satisfaction





## Evolving feedback processes to drive business growth

Ansys is a global leader in engineering simulation, with its software playing a critical role in rocket launches, flight, car travel, computing, mobile and wearable technology. Founded in 1970, Ansys employs over 4,400 people and has been recognized as one of the world's most innovative companies. Needing to capture feedback from a growing customer base and around an increasing number of applications and products, Ansys runs a comprehensive Customer Feedback program.

Customer feedback is a vital part of the ISO 9001 certified Ansys Quality System. The program spans over 100 countries and nine languages, and gathers insight from multiple touchpoints from the website, to customer installation, to partners, to customer support, and many more. In line with company growth, the program has evolved to focus on specific application areas, allowing teams to understand how well the complete Ansys solution enables its customers to solve their problems.

For Ansys, survey-driven customer monitoring and care is a long-term initiative and investment, established throughout the company up to the CEO level. Surveys tailored to the various aspects of Ansys' business aim to achieve a 360-degree coverage of client interaction, driving continuous improvement. What's more, the full commitment of the CEO and business leaders ensures the right resources are aligned to the program.

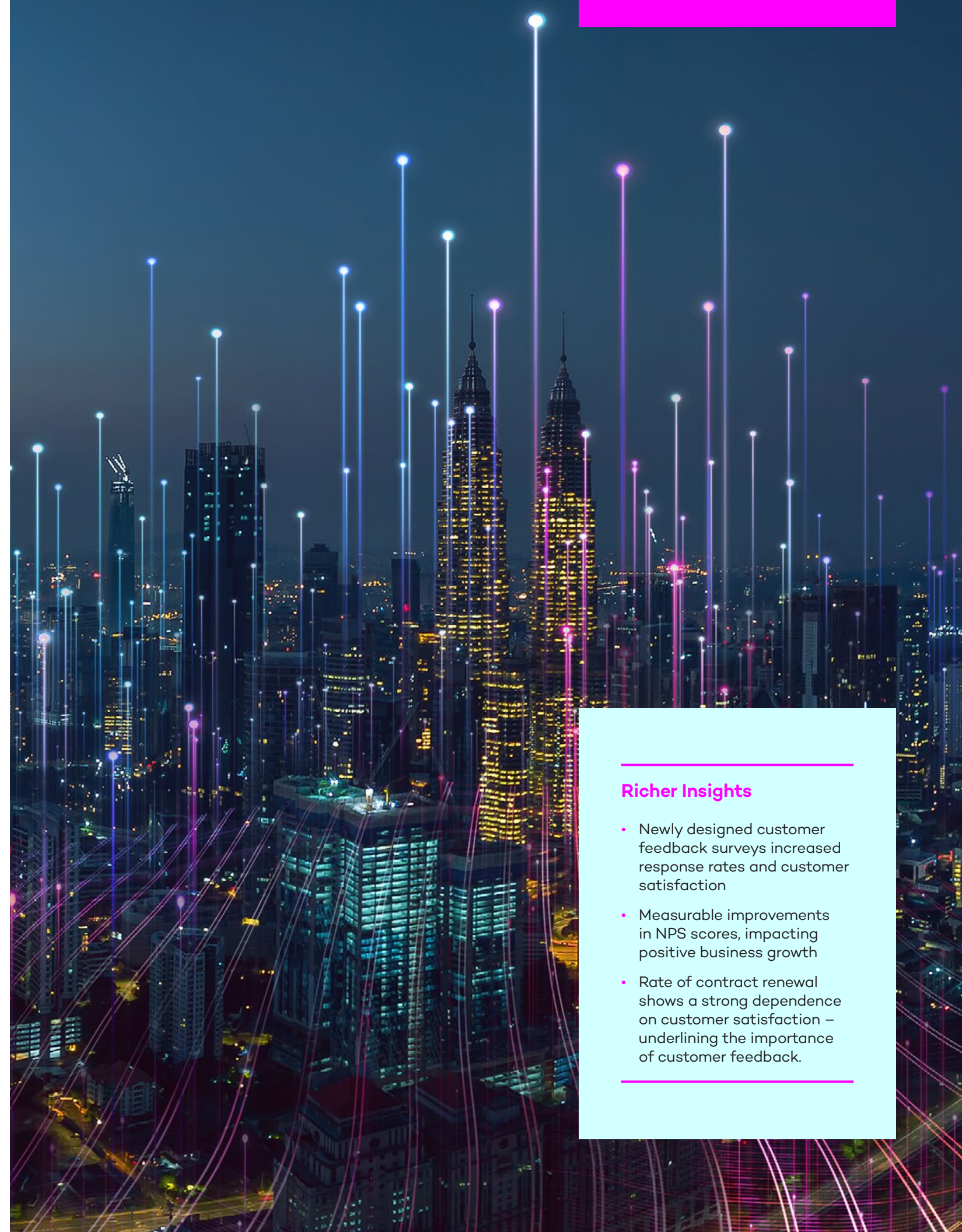
Results from the program are used in external and internal communication throughout the company. More than 100 Ansys managers from all business areas are assigned to analyze survey feedback, follow up with clients and take back related findings into their teams. This ensures that all employees can understand customers' needs, and consistently provide the products and services that meet or exceed expectations.

**“We believe that our continued focus on the voice of the customer is important for our sustained business growth, even through difficult times such as the pandemic.”**

**Carl-Henning Rexroth,**  
ACE Operations Manager

### Richer Insights

- Newly designed customer feedback surveys increased response rates and customer satisfaction
- Measurable improvements in NPS scores, impacting positive business growth
- Rate of contract renewal shows a strong dependence on customer satisfaction – underlining the importance of customer feedback.







# Evolving to deliver market-leading customer experiences

**“CX within Brenntag is now a way of life. The change in the UK & Ireland business and Service Excellence initiative has contributed to significant financial success and has captivated the attention of many others as a result. This success has granted us the freedom to bring customer-centricity to the fore.”**

**Shaun Myers**  
Director of Supply Chain & Service at Brenntag

**“Brenntag has evolved into a business that truly puts the customer at the heart of all that it does. The business has really shaken up the chemical distribution market and now lives to give service excellence to every customer, every day.”**

**Marc Brokenbrow**  
Research Director at B2B International

**Brenntag is a leader in the distribution of chemicals and ingredients across various industries, employing over 900 people. It offers a wide range of products and ingredients, technical support, regulatory guidance and compliance advice. Brenntag works with B2B International, a global, full-service market research consultancy dedicated to researching business-to-business markets. Together, they have developed the Brenntag Service Excellence Initiative.**

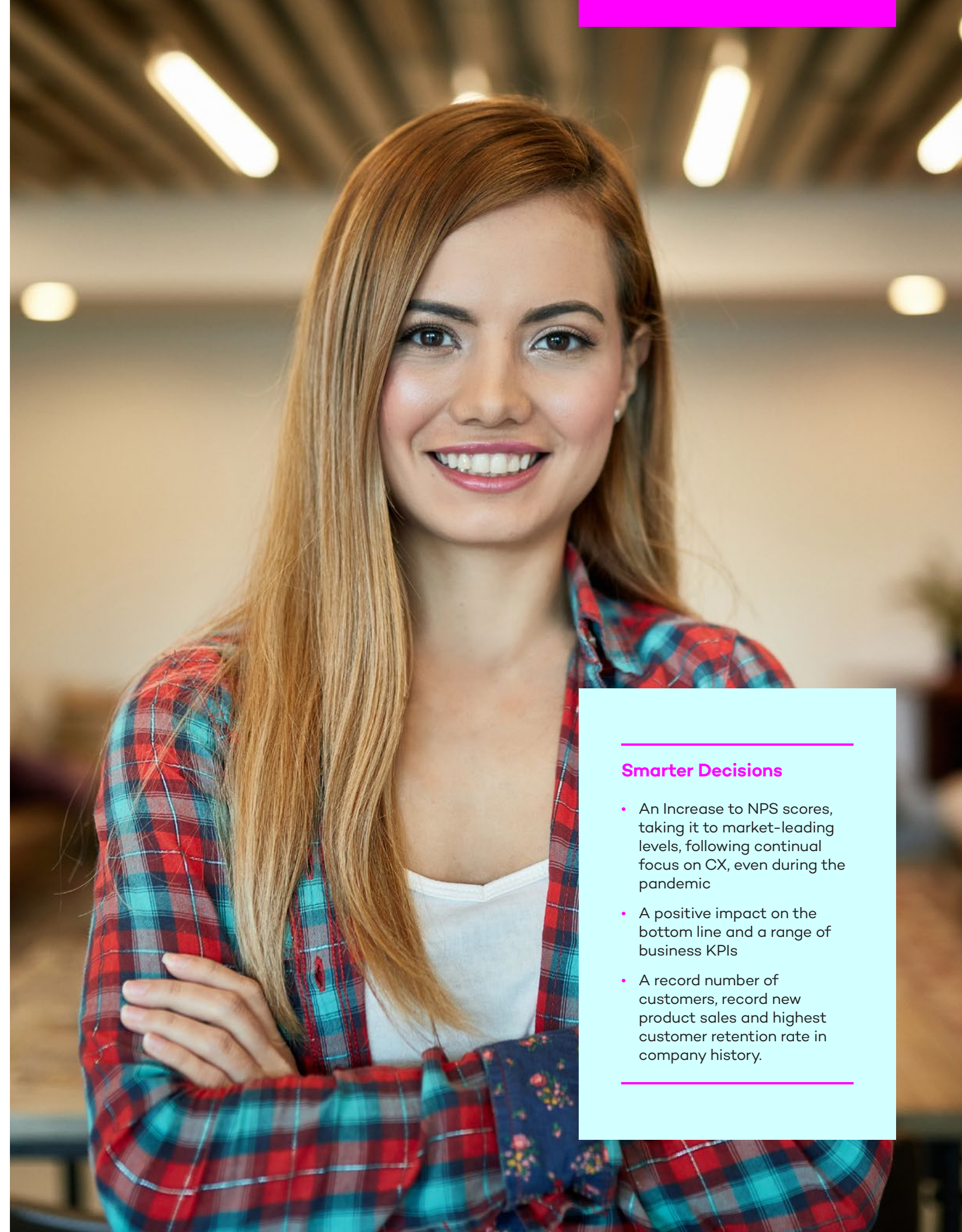
The initiative was designed to allow Brenntag to differentiate in the market and drive commercial success. It covers a range of touchpoints across the customer journey from quotations and ordering to delivery, account management and customer services. Initially covering the UK and Ireland, it has now been rolled out to over 40 countries in 25 languages.

Innovation and creativity are the lifeblood of the initiative. Visualized customer journeys created by B2B International bring CX findings to life for Brenntag employees, ensuring customers are present in every room and the voice of the customer is heard loud and clear across all business functions. This has powered a cultural shift from being supplier-led to customer-focused, and from product-based to solution-driven.

Acting on customer feedback is where Brenntag's program has been truly successful. Internal working groups continually review data and make any necessary changes in direct response to customer needs. The program has evolved to incorporate pulse interviewing around specific touchpoints, and to track the full customer experience over time. This allows Brenntag to gain and act on real-time feedback through a closed-loop system.

## Smarter Decisions

- An Increase to NPS scores, taking it to market-leading levels, following continual focus on CX, even during the pandemic
- A positive impact on the bottom line and a range of business KPIs
- A record number of customers, record new product sales and highest customer retention rate in company history.







## Direct interaction for positive customer and employee experiences

The lives of animals and humans are interconnected in deep and complex ways. We know that when animals are healthy, humans are healthier too. **Boehringer Ingelheim Animal Health, the second largest animal health business in the world, has employees across the globe dedicated to delivering value through innovation, thus enhancing the well-being of both.**

Respect for animals, humans and the environment guides the company every day. They develop solutions and provide services to protect animals from disease and pain. They support their customers in taking care of the health of their animals and protect communities against life- and society-threatening diseases. Committed to their customers, **Boehringer Ingelheim Animal Health** runs a dedicated Customer Care Voice of the Customer Program as part of its customer approach.

The program allows **Boehringer Ingelheim Animal Health** to gather direct feedback from its veterinary customers to provide coaching to its customer care teams. This enables continual enhancement and evolution of the customer experience. Feedback is also used to give kudos to team members and celebrate successes, drive actionable business decisions, and share valuable feedback to other departments.

Over time, the program has evolved with the addition of new components that are designed to drive direct action to feedback. One of these is the Value Enhancement Score which focuses on feedback from when a less than ideal response is received, driving appropriate action. This also allows the team to reach out directly on contact alerts to personalize each resolution and thank the customer for their valued time.

The program has allowed **Boehringer Ingelheim Animal Health** to reap the benefits of low customer effort and high customer retention. Each call the team takes yields high ROI as a direct result of the VoC program allowing any negative interactions to be turned into positive ones.

**“Our team takes our true passion for our customers and owns it with our approach to our VoC program.”**

**Ben Drummond**  
Manager, VOC & Process Improvement



### Smarter Decisions

- Very high average Customer Effort Scores received across the entire representative base
- Highlights any potential issues with stock or product orders, allowing fast resolution of potential customer dissatisfaction
- Kudos system from feedback provides encouragement, motivation and best practice sharing across the entire team.



Catalent



## Enhancing customer experience by activating their Customer Dedication Value locally

Catalent is a global provider of technologies and development solutions for drugs, biologics and consumer health products. Employing 15,000+ people, the company has 85+ years' experience in bringing products to market faster, enhancing product performance and ensuring reliable clinical and commercial product supply. Catalent runs a global Customer Experience Excellence (CEE) program that covers 80 countries and seven languages.

The CEE program covers multiple touchpoints in multiple business areas: Business Development, Project Management, Product Development, Quality and Customer Service. The team drives change management aligned to three primary strategy pillars - People, Experience Engineering, and Systems - this CEE approach allows local teams to deliver global programs aligned to best practices.

Throughout the last three years the team has launched and grown Catalent's first Global Voice of the Customer (VoC) program. As well as delivering improvements to customer onboarding, VoC has had a significant impact on driving success during the COVID-19 pandemic. By understanding where customers and prospects were finding challenges during the pandemic, the local teams were trained in new Smart Glasses technology allowing the business to continue to sell new programs, maintain existing relationships and facilitating audits while continuing to safeguard its people manufacturing essential medications.

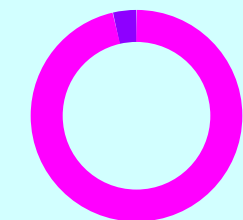
Through the CEE, Catalent has engaged a community of employees to become *I Am Catalent* local trainers, responsible for rolling out customer service training that includes best practices for cross-cultural communication. In addition, the *I Am Catalent* core training has been incorporated into New Hire Onboarding to create a consistent improvement of the communication expectations across the company.

**"It's been an exciting 4 years since launching the program. We've taken a 'it may not be our fault, but it is our problem' systems approach to emphasize the importance of the experience our customer receives. This allows our people not traditionally used to thinking about how they contribute to the delivery of the Catalent experience to find ways to improve for our customers and their patients."**

**Joe Mantano**  
Director of Customer Experience & Communication Excellence

### Richer Insights

- New business onboarding process compliance grew from 73% in 2019 to 96% in 2021. Their customers rated this process as a key success driver in the most recent Annual Relationship Survey
- Improvement across all eight customer experience drivers year on year and an improvement in the NPS score compared to last
- Customer Experience incorporated into Strategic Planning Cycle, recognized at executive level, and work continues to embed the CEE mindset as an organization-wide culture.



**96%**

New business onboarding process compliance grew to 96%



COGNITA

## Capturing the voice of parents for better educational experiences

Cognita is a worldwide group of 85+ schools in Europe, Latin America and South-East Asia. It employs over 7,500 teaching and support staff in the care and education of more than 58,000 pupils. While each school operates individually, they share a common purpose: to create an inspiring world of education. Cognita achieves this by sharing expertise, insights and best practice across every school and by maintaining standards of excellence through actionable feedback.

This is captured through a unique set of programs for Voice of the Employee (VoE), Voice of the Student (VoS) and Voice of the Customer (VoC). The VoC program focuses on gathering the Voice of the Parent in nine languages, then sharing this insight in a way that is actionable for school leaders and their regional management teams.

Insight is gathered to understand what parents experience at key stages of their admissions journey, follow up with them promptly, and understand – in a granular way – what aspects of school provision can be improved. The program measures, at an aggregate level, movement in customer advocacy and key drivers of satisfaction over time.

As the pandemic hit, the Voice of Parent program was adapted to include pulse surveys and cover 1:1 device rollout for students working remotely. Parents were able to provide feedback directly on their children, where schools were working well and where processes could be improved. The flexibility of Forsta ensured that Cognita could adjust its programs to each country's current state as the pandemic progressed.

**“Our program enables us to turn insights into action, drives better value for our customers, parents and students, and allows schools to focus on what really matters.”**

**Stephan Hogenbirk**  
CX Program Manager



### Richer Insights

- Biggest success of Voice of Parent program to date with increases in NPS across all regions
- Parent feedback informed the introduction of a dedicated parent tool, Cognita Connect, to provide a single communication channel
- Integrated approach to collecting and analyzing data reduces feedback-based workloads for schools while highlighting trends and areas for action.





## Drive ease of doing business through customer-centricity

Cromwell is a supplier of industrial tools to all industries, professions and trades. Established for over 50 years, its technical teams provide audits and offer advice on how businesses can improve with safety, cutting tools, hand tools, power tools and abrasives. Awarded Great Place to Work certification in 2021, Cromwell is committed to delivering a truly customer-focused and cost-effective service.

To achieve this, Cromwell runs a multi-lingual Voice of the Customer program across multiple touchpoints in the UK and EMEA, with further rollout now taking place across APAC. The program is designed to listen more closely to customers and enable responses that enhance experiences across the entire customer journey. This provides an active, real-time link between feedback and action.

Driving its ambition to be 'the easiest company to do business with', CX strategy has been cascaded to all 1600 Cromwell colleagues, moving the organization to an insight-driven, customer-first culture. Text analytics is used to contextualize feedback, allowing teams to see, per customer journey stage and customer type, how actions translate into customer experience.

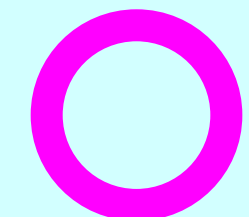
By continuing program rollout virtually during the pandemic, Cromwell has ensured high levels of engagement from both customers and colleagues. Across the organization, teams 'start with the customer' and include customers in their decision-making. Collaboration with customers now happens daily to develop practical solutions to their problems, and to drive the company's strategy around renewable energy.

**“Customer-centric leadership and vision has brought a totally different way of thinking to Cromwell. The trajectory of results speaks for itself. Everything we do revolves around our customers now.”**

**Louise Durnin**  
Customer Experience  
& Marketing Director

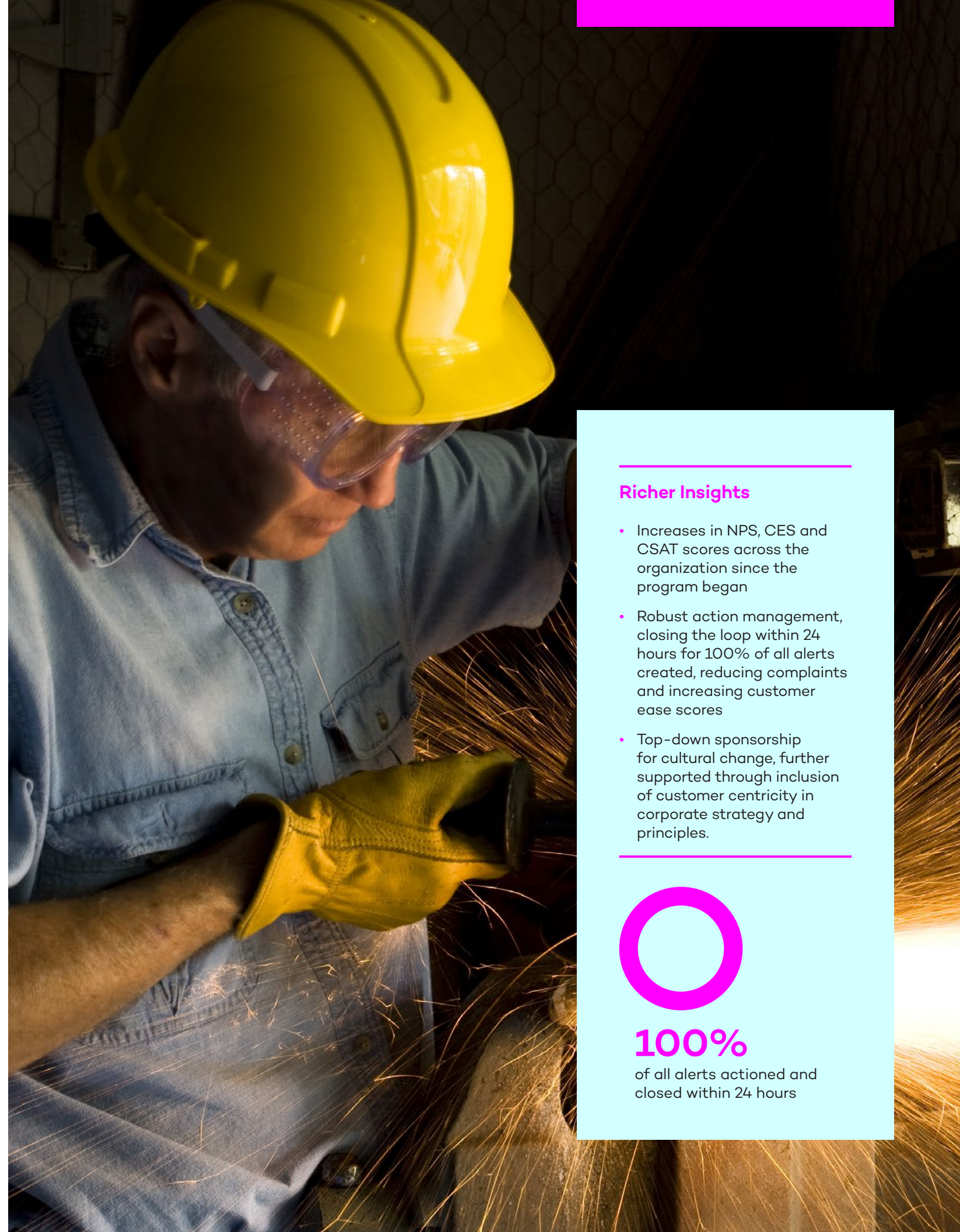
### Richer Insights

- Increases in NPS, CES and CSAT scores across the organization since the program began
- Robust action management, closing the loop within 24 hours for 100% of all alerts created, reducing complaints and increasing customer ease scores
- Top-down sponsorship for cultural change, further supported through inclusion of customer centricity in corporate strategy and principles.



**100%**

of all alerts actioned and closed within 24 hours





decisionwise



## Understanding key moments in the employee lifecycle

DecisionWise is an employee experience consulting firm specializing in leadership and organization development. Founded in 1996, its services include employee engagement surveys, 360-degree feedback, employee life cycle surveys, leadership coaching, and organization development. DecisionWise operates in over 70 countries and conducts surveys in over 30 languages.

**“We have incorporated our employee experience best practices with scalable technology for organizations with as few as 100 employees to those over 100,000 employees. Forsta’s world-class technology plus DecisionWise’s industry-leading methodology and thought leadership, is a winning combination.”**

**Justin Warner**  
VP Sales and Marketing

DecisionWise combines its expertise in Employee Experience (EX) with Forsta technology to create concise but powerful survey instruments. These are designed to help clients better understand the experience of their employees. The DecisionWise Employee Life Cycle Suite is one such product, blending technology and philosophy to provide a single interface to understand key moments of the employee lifecycle: onboarding, anniversary and exit.

The solution provides valuable employee insights while reducing the administrative burden for HR teams. By automating the collection of data through a feed from HR systems, and streamlining results reporting, DecisionWise clients can focus their time on understanding the data and taking meaningful action to improve the employee experience.

Critically, The Employee Life Cycle Suite features a unique methodology to make data more useful to organizations for interventions. For example, the onboarding approach separates the process (what are you doing?) from the outcomes (how is it working?). This helps HR teams to understand if a process is being followed, and if the process is achieving the desired results.



### Smarter Decisions

- Streamlined processes for HR teams, with surveys triggered automatically at key lifecycle moments
- Comprehensive and adaptable online reporting through dashboards and charts, with options for export
- Anniversary Pulse tool combines employee recognition with feedback collection to continually monitor the employee experience.





## Driving business success through a singular customer focus

**“Positive feedback correlates to the hard work and effort of each employee and contractor at Empire Today, where everyone plays a role in creating and delivering extraordinary customer journeys. Building relationships with customers through feedback is pivotal – feedback brings Empire Today closer to our customers’ needs and tells us where to target initiatives that continuously improve this relationship.”**

**Ron DeWert**  
VP – Consumer Insights  
& Media Analytics

Empire Today provides residential and business customers with a wide selection of quality, name-brand products including carpet, hardwood, laminate, ceramic tile, vinyl flooring and window treatments. Empire Today is a team of 1,500 employees that provide shop-at-home convenience and next day professional installation to more than 70 metropolitan areas throughout the United States. Empire Today has been in business for over 60 years, is proud to have served over three million satisfied customers and is dedicated to being America’s first and best choice for flooring as a brand consumers know and trust.

Empire Today delivers a comprehensive VoC program, centered around APS (All Promoter Score), which combines feedback from both Empire Today customers and those that chose not to purchase with us. In addition to NPS (Net Promoter Score), to gauge overall customer engagement and NSS (Net Satisfaction Score) to evaluate and measure the drivers and sub-drivers of the customer/non-customer experience, thereby providing root-cause actionability.

Empire Today utilizes the results from the VoC program to deliver on three key objectives: (1) improve the customer experience to influence repurchase and positive word-of-mouth; (2) improve the non-purchaser experience to increase future consideration; (3) improve closing rates of non-purchasers through retargeting and a follow-up alert system to all feedback. The program delivers actionable data to achieve this, using root-cause identifiers at the most granular levels.







**“ERIE’s comprehensive VoC, VoA and VoE Program uses Voice end-to-end to inform and drive change, deliver full transparency of results, and create a high level of engagement with ERIE Experience from employees to the board and across ERIE.”**

**Barbara Lincoln**  
Director, Customer Satisfaction & Integration

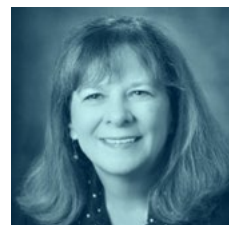
## Fully integrating the voices of customers, employees and agents

Erie Insurance, established in 1925, is a U.S. property/casualty, home and auto insurer, operating in 12 states and the District of Columbia. It has more than 5 million policies in force, employs over 6,000 people and works with 13,000 independent agents. Erie has a dedicated focus on The Golden Rule, ensuring its employees work together for the good of the customer.

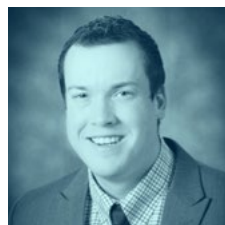
Supporting this is ERIE’s comprehensive Voice program, spanning Voice of the Customer (VoC), Voice of the Employee (VoE) and Voice of the Agent (VoA). The program covers key customer touchpoints at multiple levels, from its mobile app and claims interactions, to training, coaching, and more.

In the past year, the program centered on maintaining customer service excellence during the pandemic, while also informing the rollout of new digital approaches. Insights gathered supported ERIE closing the digital gap, while continually strengthening its competitive niche of customer relationships in the digital environment. VoC is proactively and consistently used to inform business priorities, decisions, and drive customer satisfaction.

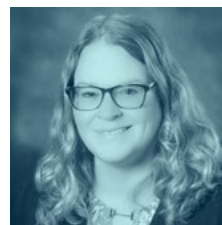
ERIE’s VoE program is an intrinsic part of its approach to ERIE Experience – Customers, Agents & Employees – focusing on the employee tools and resources best suited to being Above All in Service. Using a range of metrics, including OSAT, NPS, and Effort, alongside verbatim comments and demographic analysis, the VoE program is a direct contributor to ERIE’s claims, customer care, and digital successes and related customer satisfaction.



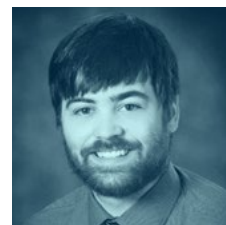
**Barbara Lincoln**  
Director Customer Satisfaction & Integration



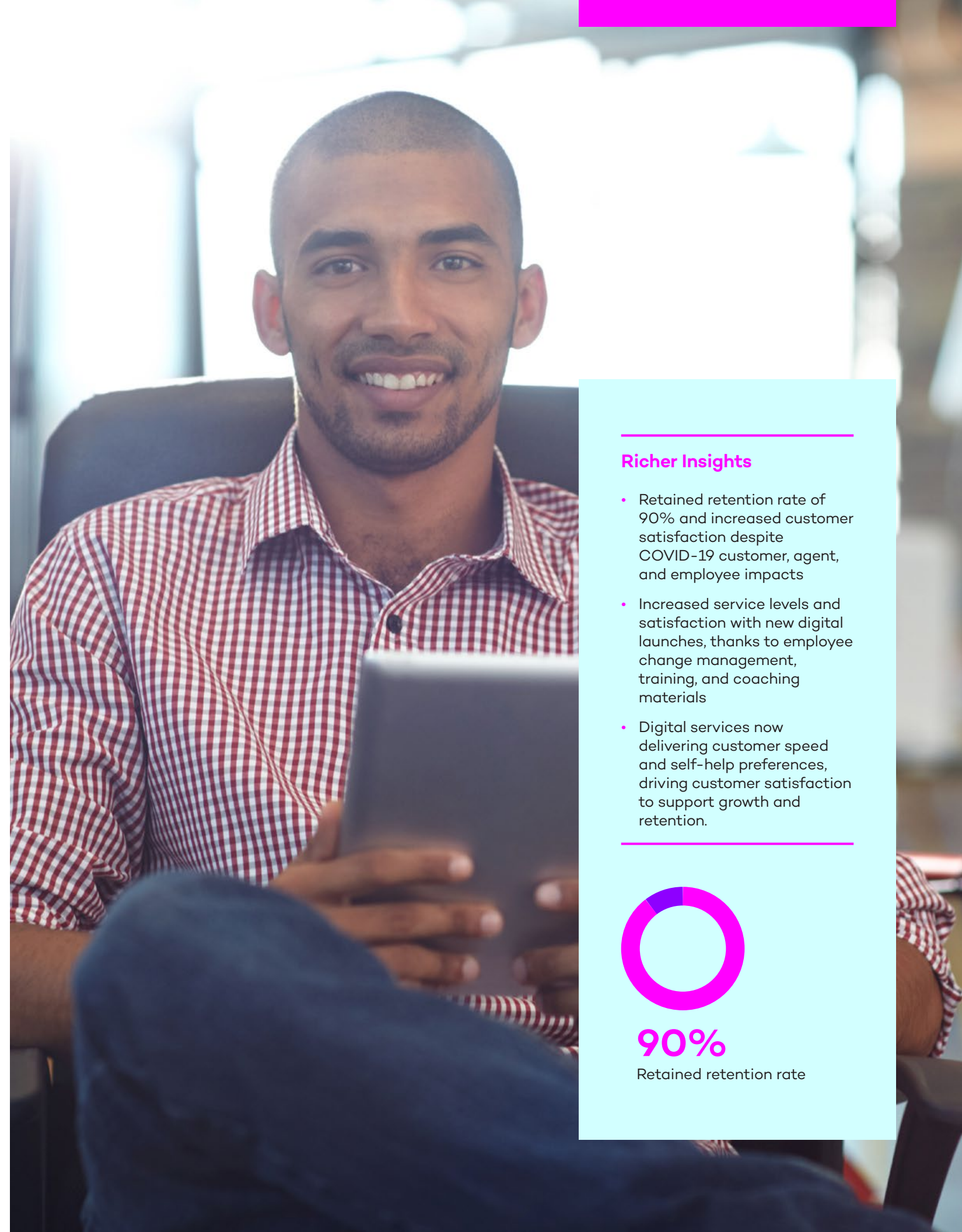
**Matt Sheldon**  
Customer Satisfaction Analyst I



**Erin Ferguson**  
Customer Satisfaction Analyst II

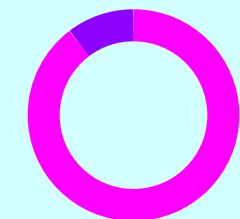


**Alex Britt**  
Customer Satisfaction Analyst II



### Richer Insights

- Retained retention rate of 90% and increased customer satisfaction despite COVID-19 customer, agent, and employee impacts
- Increased service levels and satisfaction with new digital launches, thanks to employee change management, training, and coaching materials
- Digital services now delivering customer speed and self-help preferences, driving customer satisfaction to support growth and retention.



**90%**

Retained retention rate





## Using the Voice of Customers to deliver great experiences

Great Southern Bank (previously CUA) is Australia's largest customer-owned bank. Its growth enables them to reinvest in its business, deepen relationships with customers and build stronger communities. To support this, Great Southern Bank runs a Voice of the Customer (VoC) program that spans all customer channels, multiple touchpoints and multiple products.

The program has been specifically designed to quantify the customer experience using a scalable framework. Currently, it provides a critical structure for Great Southern Bank's rebrand as a bank, a move that has been defined and built around the needs of customers. It also allows Great Southern Bank to understand and act upon changing consumer sentiment, and to make smart decisions to answer high internal demand for new product development.

The program delivers insight to ensure Great Southern Bank prioritizes the experiences and initiatives which provide the largest return for its customers. Using a broad range of Forsta capabilities, Great Southern Bank captures the full picture of customer journeys and experiences, driving deeper understanding and informing accurate decision-making. This ensures Great Southern Bank can provide fast service recovery in the instance of member issues, drive compliance and share best practices among team members.

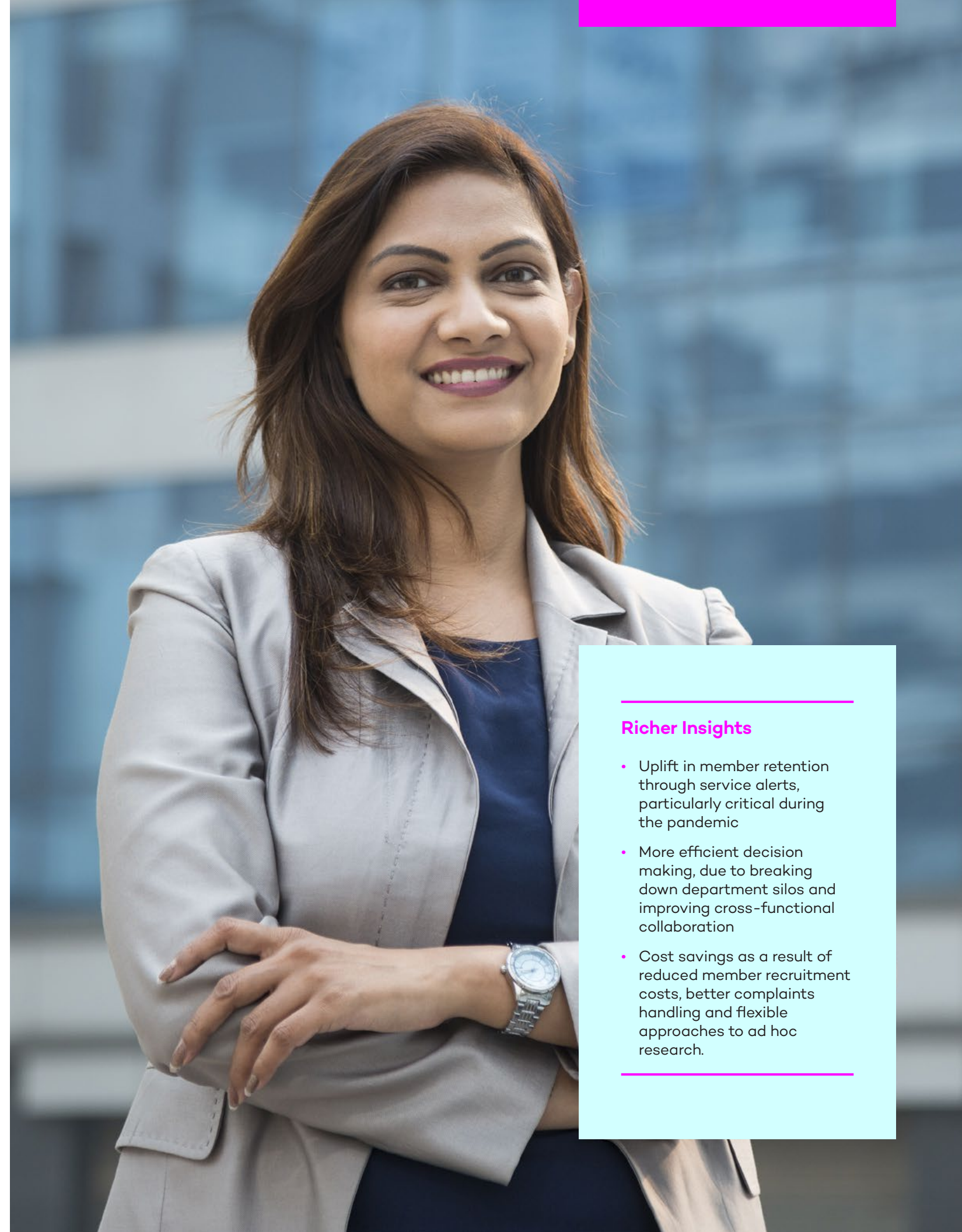
The business impact of the VoC program reaches across the organization. At the executive level, insight-led improvements are promoting a culture of evidence-based decision-making. Cultural change is also happening at the team level: VoC onboarding is included in new team member inductions, and is used by frontline and service teams for training and coaching.

**"VoC plays such an important role in the overall performance of our business. It forms a large part of, driving even better customer experiences and products for our customers."**

**Rachael Coulthard**  
Senior Manager – Customer  
Research & Insights

### Richer Insights

- Uplift in member retention through service alerts, particularly critical during the pandemic
- More efficient decision making, due to breaking down department silos and improving cross-functional collaboration
- Cost savings as a result of reduced member recruitment costs, better complaints handling and flexible approaches to ad hoc research.







## Turning CX into a tangible and strategic business tool

Grodan supplies innovative and sustainable stone wool growing media solutions for the professional horticultural sector, based on precision growing principles. Founded in 1969 and active in over 70 countries, Grodan is headquartered in Roermond, the Netherlands. It has recently introduced a dedicated focus on Customer Experience and implemented a range of initiatives to support this across the organization.

**“Our program allows our culture to evolve from one that was product-oriented to one that is customer and value-driven. It supports our overall desire to serve our customers better and retain them.”**

**Gerda Swinkels-Legierse,**  
Customer Experience Manager

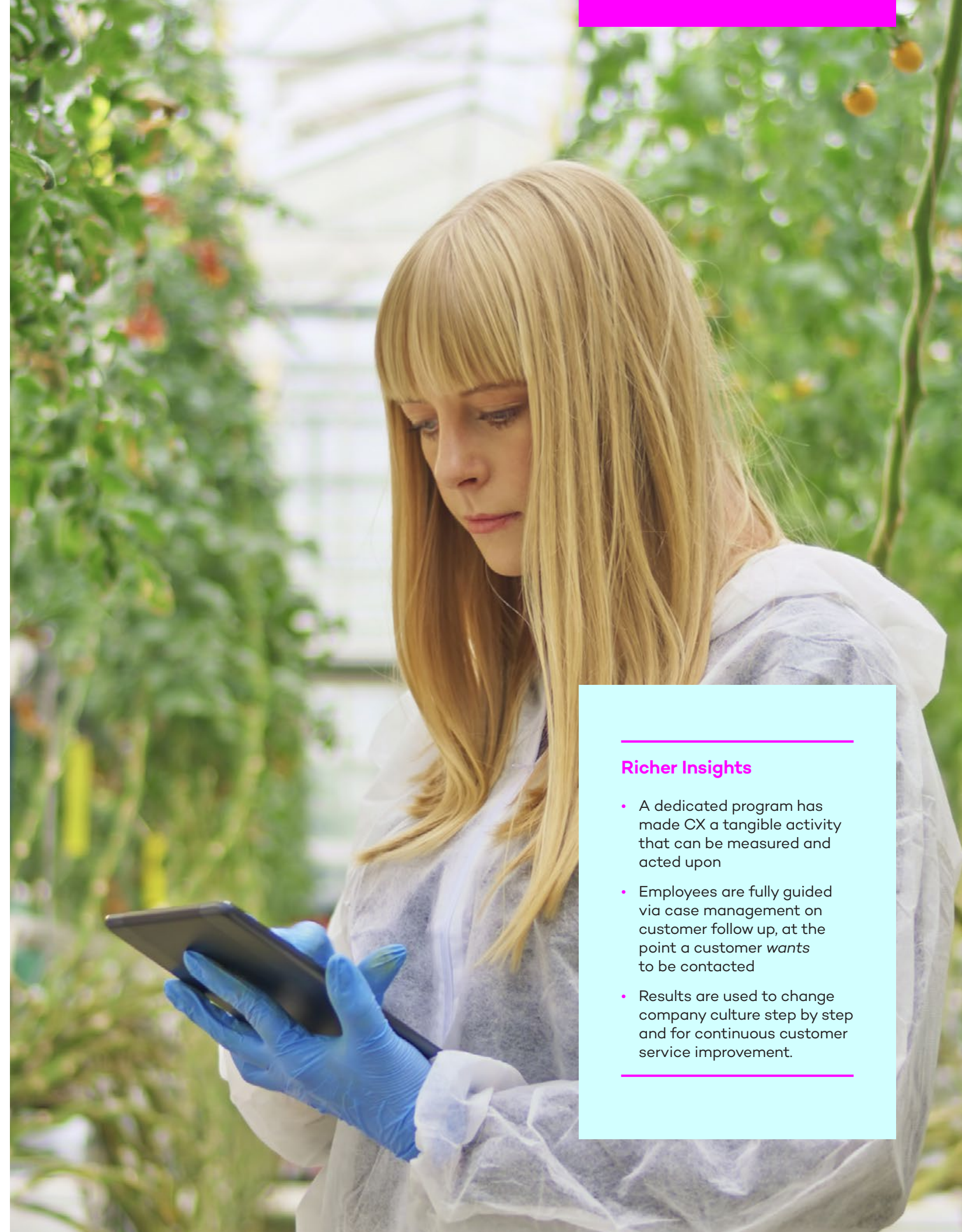
The first step for Grodan was to create a CX strategy, involving colleagues from across the business. A deep analysis of the customer journey was undertaken to build a picture of the entire customer experience. This allowed the organization to detail the end-to-end customer journey to drive a better understanding of customer needs, emotions, and the moments that are most valued by them.

The program was then developed to gather insight via surveys in seven languages, focusing on customer interviews and identifying key moments of truth as well as the overall experience. It uses a two-step root-cause approach to highlight ‘THE ultimate moment of truth’, and to show what makes the biggest impact. Experience themes are supported by visual imagery which stimulates qualitative responses to more deeply understand the full customer story.

The program provides CSAT and CES scores to Grodan, which can be directly related to its departments and teams. In addition, it also gathers insight around the experience with third-party partners. This has shown Grodan how partners also impact the customer experience, allowing them to improve performance and optimize service level agreements with third parties.

### Richer Insights

- A dedicated program has made CX a tangible activity that can be measured and acted upon
- Employees are fully guided via case management on customer follow up, at the point a customer *wants* to be contacted
- Results are used to change company culture step by step and for continuous customer service improvement.





HKA



## Customer centricity inspires loyalty and spurs growth

**HKA is a leading global consultancy in risk mitigation and dispute resolution. With more than 1,000 experts, consultants and advisors based in 17 countries, the firm has unmatched multi-disciplinary expertise to help clients manage risk, disputes and uncertainty on the most complex contracts and challenging projects.**

HKA combines profound experience across these specialisms to serve a broad client base spanning a wide range of industries and parties – from lawyers and owners/operators to contractors, financial institutions and state bodies. As the firm refines its business strategy, a key priority is to enhance understanding of its customers' perspectives on the HKA brand and service offering. In 2020, the firm established a Voice of the Customer (VoC) Customer Centricity program across its 40-plus offices and all countries in which HKA operates.

Covering multiple touchpoints and initiatives, the VoC program allowed HKA to validate its Client Value Proposition and new Client Focus Strategy. It also ensures customer-centricity while developing operational, marketing and business development plans.

Centered on the Net Promoter Score (NPS) Client Feedback Survey, the program captures insights into how HKA makes a tangible difference for its clients. By highlighting the brand values that must be put into action to fulfill HKA's promise to clients, these insights indicate how the firm can better manage and improve client relationships.

HKA's program is enabling a consistent, coordinated, and strategic approach to hearing what customers have to say and harnessing this as actionable intelligence. This increased focus on customer-centricity across all services – uniting teams and clients around one HKA story – has had a direct impact on business growth and repeat business in 2020 and 2021.

**“The VoC program insights have proved powerful in ensuring that our people at all levels in the firm understand our clients’ perspective. We are using this knowledge to drive continuous improvement and better serve our clients with the hope of becoming their trusted advisors in additional areas.”**

**Linda Orton**  
Chief Marketing and Business  
Development Officer

### Smarter Decisions

- A more proactive approach to addressing customers' concerns is nurturing relationships and generating more repeat business
- Listening to and acting on customer feedback has helped HKA hone its Client Value Proposition and add further value, while growing turnover
- Using customer insight has enhanced HKA's Client Focus Strategy and clients' trust and confidence in its services.







## Driving customer experience through great service and great employees

If P&C Insurance AS is a property and casualty insurer in the Nordic region, with over 3.7 million customers in the Nordic and Baltic countries. If offers a full range of property and casualty insurance solutions and services to a broad customer base, from private individuals to large corporate customers. If has a firm purpose to be the most caring insurance company, promising customers to be 'By Your Side' and using its core values to guide how it behaves daily.

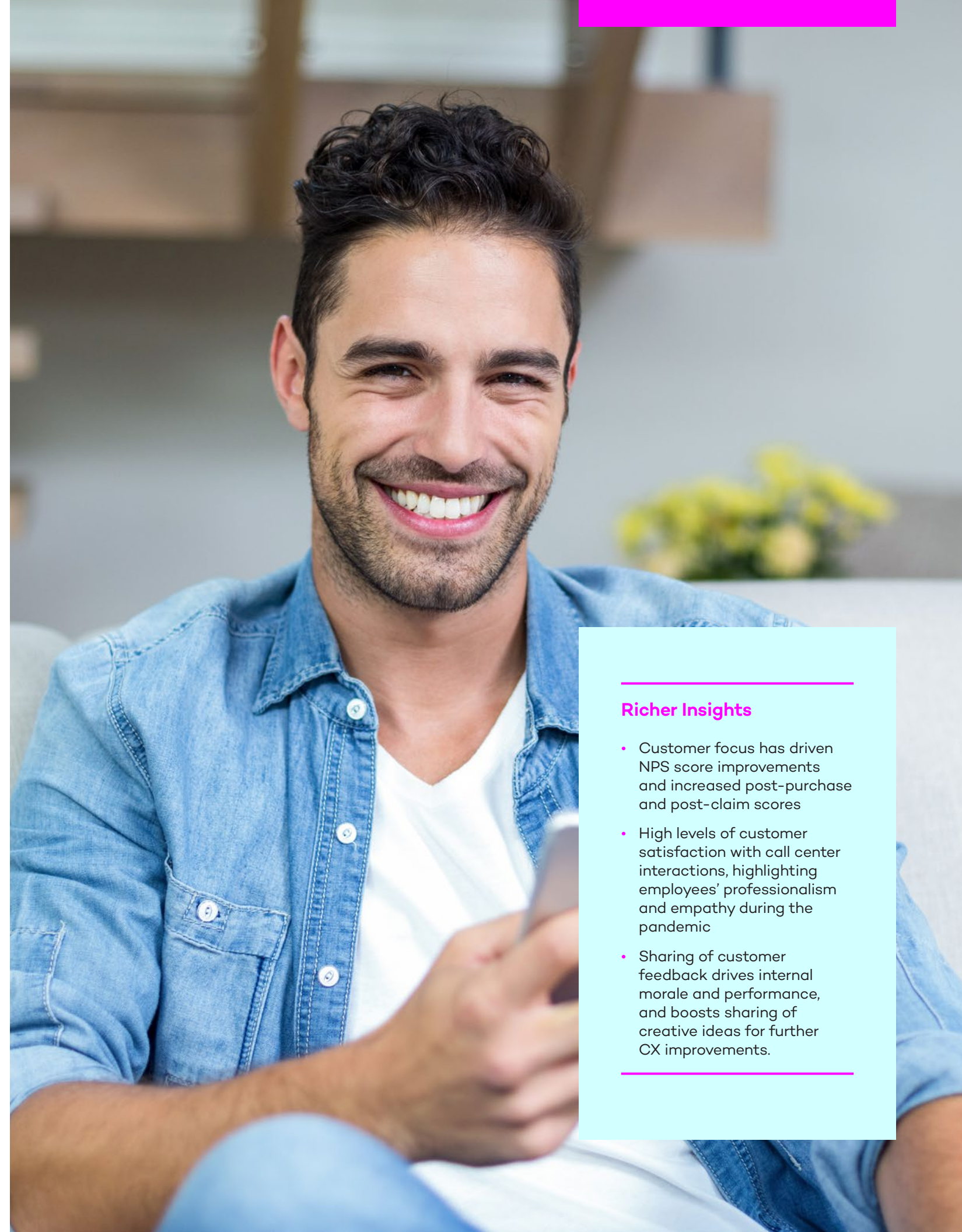
To achieve this, If runs a multi-country, multi-lingual post-purchase and post-claim CX program. One of the key areas of focus is customer retention, which became increasingly important as the pandemic drove more customer interactions via digital channels. Furthermore, 'By Your Side' became more critical, not only for customers but also for employees to drive continued positive team spirit and morale.

The CX program measures customer experiences, centered on NPS, across key areas of the business and has driven improvements in the transaction process, answering customer queries, online insurance purchasing and payment procedures. In particular, the insight gathered has driven If to develop machine learning functionalities and robotic processes to allow frontline employees to focus on more value-driven work.

In addition, the program provides insight into employee engagement, with If understanding that employees are their first recommenders and those who are engaged work harder to create the best insurance experience. Employee engagement and satisfaction are measured by employee NPS (eNPS) score and results have informed employee capability development programs.

**“We have come a long way to reach a level where analyzing customer feedback, listening to the customer’s voice, and redesigning products and processes according to the feedback is an inseparable part of our daily work. We are focusing on the customer journey to create customer experiences that exceed all expectations.”**

Jane Rist  
CX Manager



### Richer Insights

- Customer focus has driven NPS score improvements and increased post-purchase and post-claim scores
- High levels of customer satisfaction with call center interactions, highlighting employees' professionalism and empathy during the pandemic
- Sharing of customer feedback drives internal morale and performance, and boosts sharing of creative ideas for further CX improvements.



**JUST.**



## Using real-time, self-serve CX to drive proactive customer service

Just Group plc is a specialist financial services group focusing on the UK retirement market. It provides advice, guidance, products and services via financial intermediaries and corporate partners, helping individuals to achieve security, certainty and peace of mind in later life. Just has a strong social purpose and prides itself on being an adaptive and innovative company. As part of this, it has implemented a comprehensive Voice of the Customer program.

A core element of the program focuses on two key customer journeys within HUB Financial Solutions: Retirement Income and Equity Release. The approach covers multiple customer touchpoints and standardizes all metrics, methodology, feedback and reporting to ensure all insight can be used and shared effectively and accurately.

As part of this, bespoke desktop reporting solutions have been developed with Forsta. This allows Just to consistently measure and track customer experiences, irrespective of client-partner or product line, and identify points in the customer journey that can be improved. Reporting hierarchies ensure the right information gets to the right people while avoiding information overload for individuals.

The VoC program has had a fundamental impact on HUB Financial Services' business culture. It also directly supports the wider Group's five strategic priorities, including getting closer to customers and partners, being proud to work at Just, and transforming efficiency. Employee engagement is addressed too, as the program highlights 'gold dust' among colleagues, recognizing individuals who deliver excellence in customer service.

**“Our program is the literal embodiment of listening to our customers and to our partners, to improve our products and services. It is a clear example of continuously using improved data and insight to drive business decisions.”**

**Mike Holland**  
Head of Insight

### Smarter Decisions

- Real-time reporting allows colleagues to self-serve, allowing them to be proactive and take ownership of delivering customer solutions
- Insight allows pre-emptive action for customer issues, reducing complaints, driving retention, increasing satisfaction and boosting reputation
- Significant cost savings through real-time, easy-access, streamlined reporting, alongside increased business through improved customer experience.







## Proactive employee engagement for a time of crisis

King County is a government entity in the U.S. state of Washington. Its 16,000 employees build on Martin Luther King's enduring legacy of shared values of equity and social justice, employee engagement, innovative thinking, and continuous improvement. As part of this commitment, King County runs an Employee Engagement program to engage employees in delivering excellent service to the public.

Over the past year, King County has faced the joint challenges of how the pandemic and racial justice movement has impacted employee engagement. With a third of its workforce moved to teleworking and the remainder working in emergency response or essential services, the County quickly implemented a program to regularly listen to employees. This allowed them to monitor engagement and well-being and quickly deploy strategies to address the most urgent concerns.

The program enabled King County to understand which approaches would support employees best in all roles, and allowed the implementation of a wide range of initiatives and resources. These included financial support for equipment; flexible working and childcare; wellbeing, health and safety measures; mental health support; and learning and development.

The program also supports King County's core focus on racial justice. It allows equity impacts to be measured and assessed when making policy and budget decisions, and provides insight that will drive decision-making for anti-racism work and criminal justice reform within the 2021-22 Executive budget.

**“What makes our program unique is its continued focus on equity. Across all engagement elements, it helps us to see where we have been able to make an impact and where we still have work to do.”**

**Brooke Bascom**  
Employee Engagement  
and Well-Being Manger



### Smarter Decisions

- Employee Engagement anchor survey, pulse surveys and action planning combine to form a proactive employee-focused program
- Rapid program adaptations ensured employees remained engaged during a hugely challenging period
- Insight allowed tailored interventions to support employees' evolving needs during changing stages of the racial justice movement and the pandemic.





## Showing dedication to customers and agents at a global scale

MoneyGram is a global leader in cross-border P2P payments and money transfers. Its consumer-centric capabilities enable family and friends to quickly and affordably send money in more than 200 countries and territories, with 90 now digitally enabled. MoneyGram has a strong culture of innovation and a focus on utilizing technology to deliver the world's best customer experience.

Supporting this, MoneyGram runs a range of relationship and experience programs. Its Agent Relationship Survey program allows the company to reach its network of 350,000 agent locations, capturing global feedback to establish metric benchmarks such as OSAT and NPS. The program has also been used to recruit to its agent panel, in order to integrate formalized agent feedback into the business.

Meanwhile, the MoneyGram Online Experience Survey is used to drive customer retention and create a smoother customer experience during the company's digital transformation. Understanding the customer experience in this process has been critical in building empathy, flexing problem-solving skills and fostering a cross-functional working environment.

Both programs allow MoneyGram to gather detailed insight at scale. Agent feedback gives a holistic view of where agent needs are being met and where improvements can be made to enhance their experience. In the same way, customer feedback for MoneyGram online is an essential component of ensuring improvements and solutions for customers are both the best choice and effective.

**“Customer centricity is not just something we say at MoneyGram. It is built into our business processes and our programs demonstrate our dedication to the customer across our organization.”**

**Zelda Barrett**  
UX Researcher



### Richer Insights

- Increase in key metrics for ease of use and sentiment, with high response rates for both programs
- 152% year on year cross-border digital transaction growth for MoneyGram online, alongside high customer retention rates
- Initial agent relationship results showing cost savings via call reduction and increased usability.

## 152%

YOY growth in cross-boarder digital transactions





## Using verbatim insight to take action across the customer journey

PennyMac Loan Services is a financial services leader providing service and innovative mortgage products to 1.9 million homeowners. With a workforce of over 6,000, borrowers get the power of a nationwide lender along with 1:1 customer service. PennyMac focuses on putting its customers first and runs a well-established CX program to support this.

Over the past year, PennyMac has continued to expand its program, reaching more touchpoints across its customer journey map. The aim was to identify further opportunities to improve the customer experience, and to better analyze verbatim comments. Using Forsta's text analytics tools, PennyMac now categorizes and labels verbatims to perform detailed sentiment analysis.

Being able to quickly and efficiently review data allows PennyMac to identify opportunities for change and do more of what makes its customers feel happy and valued, increasing the positive perception of the company. It also ensures teams can close the loop on feedback and drive a positive experience for customers from the beginning to the end of their journey.

By identifying and taking action to remove customer dissatisfaction, PennyMac has seen a decrease in customer service call volumes, which has also reduced costs. Increasing customers' favorability has supported the cross-selling of products and customer referrals, increasing revenue. In addition, deeper analysis of customer feedback has enabled PennyMac to review operational processes with interdepartmental teams, guiding how they interact with future customers.

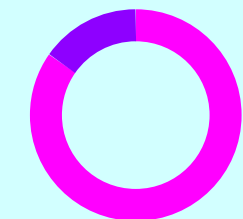
**“Our CX program creates a collaborative environment. It is PennyMac’s culture to focus on the customer and our program is structured to support us doing that, as one team.”**

**Terry DuVarney**  
Senior Vice President



### Richer Insights

- Over 85% of all verbatims categorized, providing deeper insight into the direct voice of the customer
- Verbatim trends are tracked, compared to NPS scores and combined with other data to identify opportunities for change
- Program leverages existing cross-divisional processes, ensuring integration, alignment and company-wide cohesiveness.



**+85%**

verbatim categorized





A Member of the Tokio Marine Group



## Delivering excellence through a combined customer and employee approach

Philadelphia Insurance Companies (PHLY) designs, markets, and underwrites commercial property/casualty and professional liability insurance products for niche markets. It has 50 offices throughout the US and approaches the market through multiple distribution channels: independent agents and brokers, wholesalers, and the internet. PHLY continuously reviews and refines its business processes to improve efficiency and the ease of doing business.

**“PHLY’s VOC Program is part of our DNA. From the Office of the CEO to all of our frontline team members, VOC and customer experience is embraced and contributes to our Good Company philosophy.”**

**Zancesca Spagnoletti**  
AVP, Quality

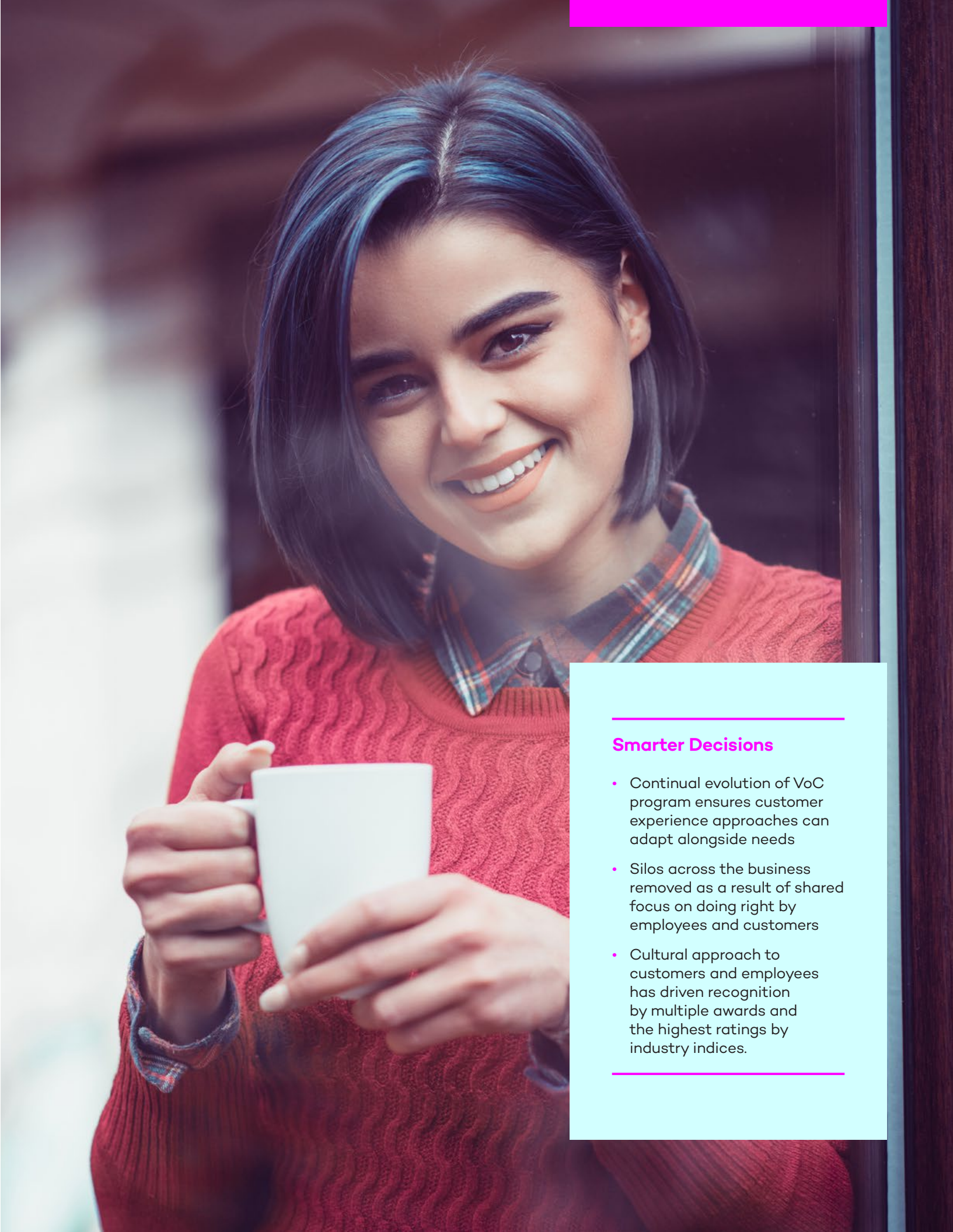
Core to this approach is the dedicated PHLY Voice of the Customer program which covers its website, multiple post-transaction touchpoints, and a customer experience (CX) relationship survey. The program underpins all employees’ commitment to develop, build, and maintain relationships with agents and insured parties. This became even more critical as the pandemic hit.

The program allowed PHLY to build on its foundational practices of authentic, positive, and proactive customer experience, and was pivotal in enabling the company to modify customer service and adapt products and solutions to fit the current situation. As a result, it had one of its best years with NPS and has been able to maintain strong financial results.

Central to PHLY’s customer approach is the employee experience. To recognize customer service success throughout the organization, it annually celebrates Customer Service Week. During the pandemic, the company knew that driving employee morale was more important than ever. It quickly adapted ways for teams and groups to meet virtually to engage and celebrate success, ensuring employee efforts were recognized and rewarded during the most challenging of times.

### Smarter Decisions

- Continual evolution of VoC program ensures customer experience approaches can adapt alongside needs
- Silos across the business removed as a result of shared focus on doing right by employees and customers
- Cultural approach to customers and employees has driven recognition by multiple awards and the highest ratings by industry indices.







## Using positive experiences to win new customers

Quest provides software solutions for the rapidly changing world of enterprise IT, helping to simplify the challenges caused by data explosion, cloud expansion, hybrid data centers, security threats and regulatory requirements. Established in 1987, it has built a portfolio of 180 solutions that are delivered to 130,000 companies across 100 countries.

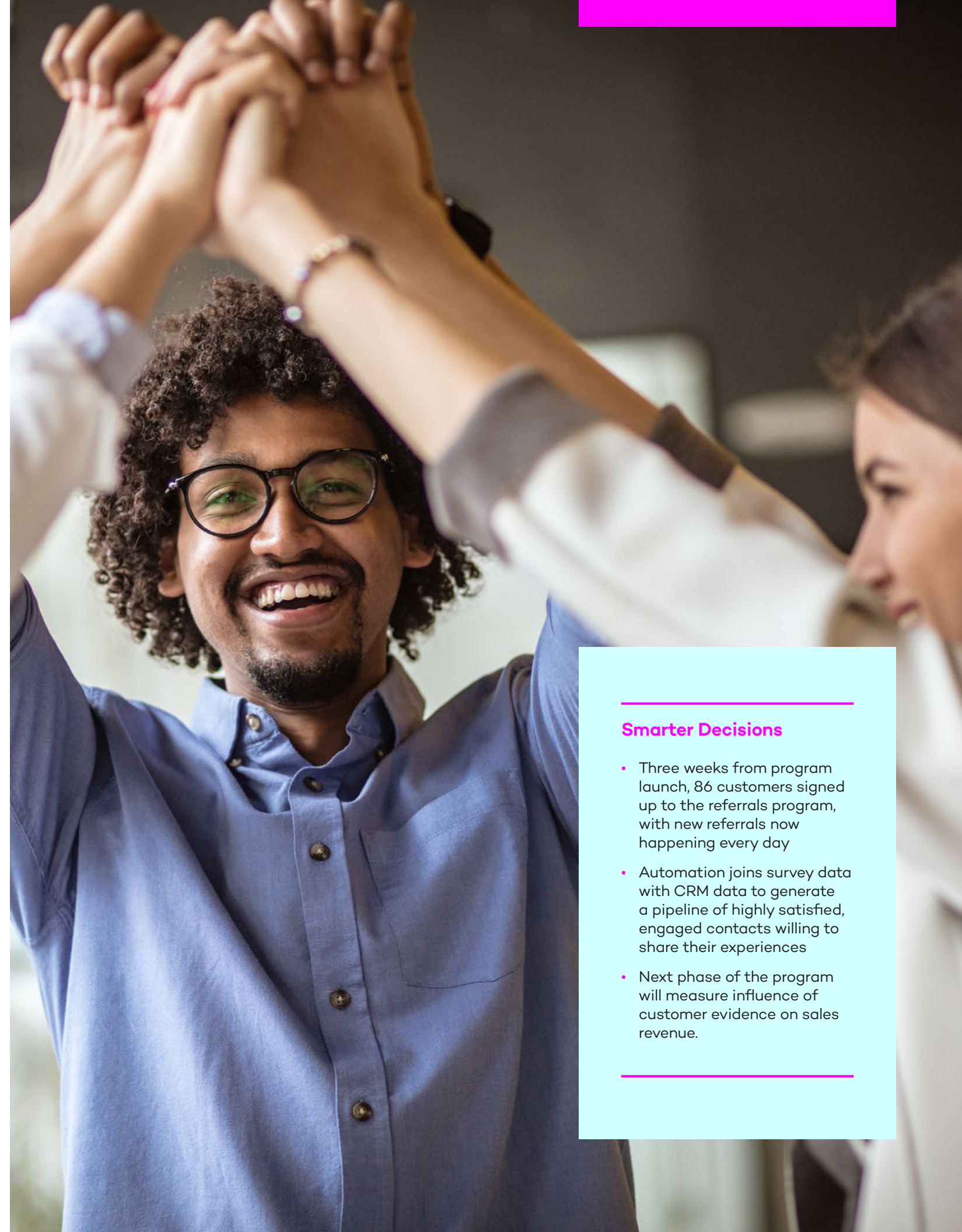
With such a broad portfolio and extensive, competitive markets, Quest wants to remain close to its customers' needs and successes. The company's Voice of the Customer program ensures that happy customers can share that info in case studies and reviews with other prospects. Quest surveys customers at different touchpoints, including its website, after professional services engagements, onboarding, and after each support transaction.

To drive further customer satisfaction and new business revenue, Quest began an initiative with its VoC program called *The Habit of the Ask*. The company-wide aim is to make sure every happy customer is asked to be a reference in some manner in their own words. After each customer survey is received, Quest uses Forsta's branching logic to identify the most highly satisfied and engaged customers, who are then asked to share their own experiences to help others solve their complex IT problems.

This automated part of *The Habit of the Ask*, allows Quest to use customer references proactively, report the results, and showcase customer proof points for sales teams to drive new business. The customer engagement team uses the insight to build awareness of the company's brand and products, working with respondents to create materials based on their answer choices, and aligning with sales to highlight referral customers.

**"We are in the midst of a sea change with how we as a company use customer references. This is a huge step forward in terms of helping the entire company highlight our happy customers and make sure we can take action on a customer's reference willingness."**

**Laureen Smith**  
Senior Global Program Manager,  
Customer Engagement



### Smarter Decisions

- Three weeks from program launch, 86 customers signed up to the referrals program, with new referrals now happening every day
- Automation joins survey data with CRM data to generate a pipeline of highly satisfied, engaged contacts willing to share their experiences
- Next phase of the program will measure influence of customer evidence on sales revenue.





# Using feedback to deliver award-winning product and service improvements

Selective Insurance Group, Inc. is a US-based holding company for 10 property and casualty insurance companies. Through independent agents, the companies offer standard and specialty insurance for commercial and personal risks and flood insurance. Selective’s position as a leading insurance group and an employer of choice is a result of its customer-driven approach and commitment to enhancing the experience for each segment of its customer base.

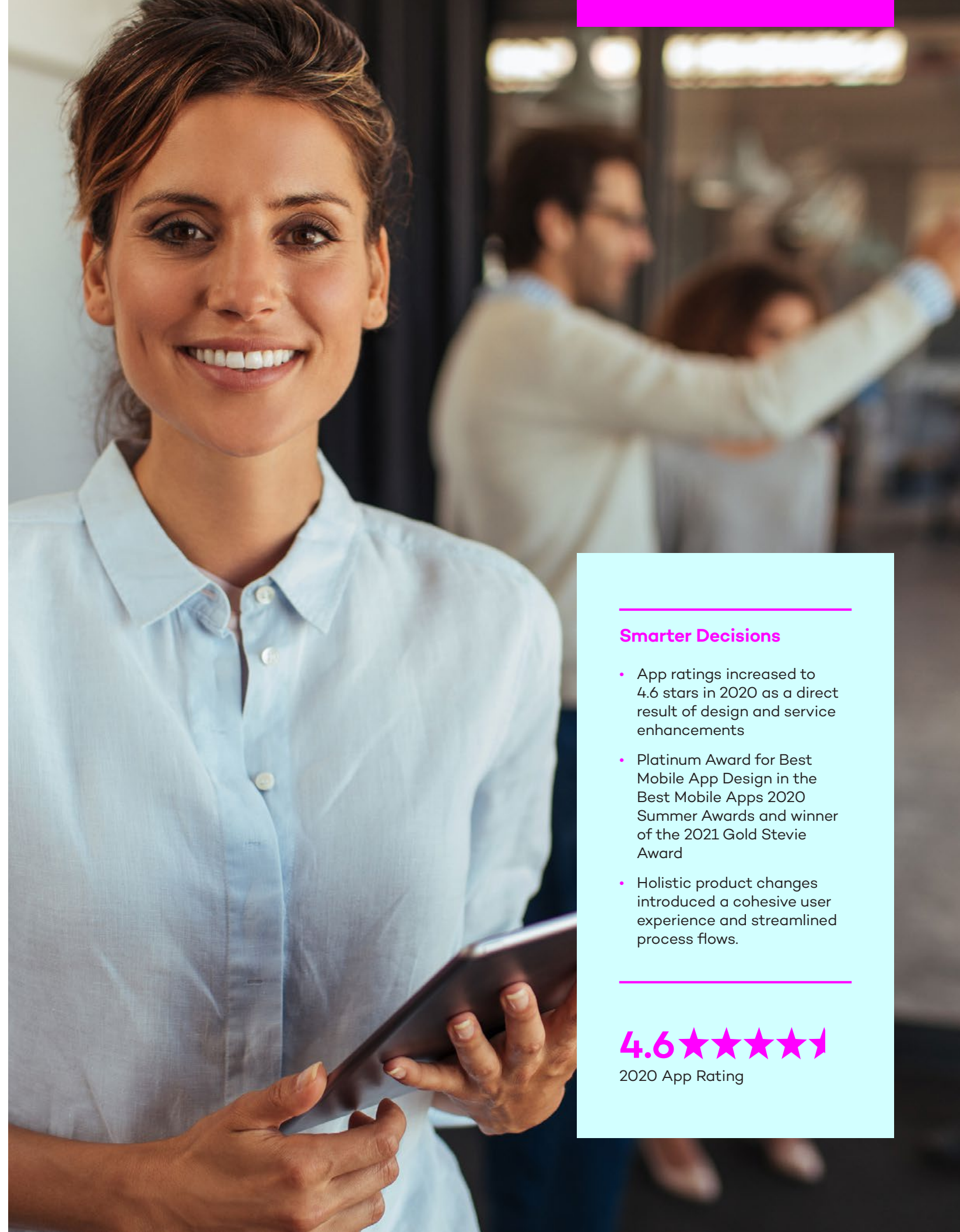
**“Our VoC program has ensured we deliver a robust self-service experience for all insurance customers, business and personal alike, and truly demonstrates what it means to “Be Uniquely Insured” by Selective.”**

**Davide Filato**  
CX Lead

As part of this, Selective Insurance runs a Voice of the Customer program to measure all aspects of its customers’ experiences. Insight gathered ensures the company spends time and resources in a targeted way to deliver best-in-class service. In the past two years and based directly on feedback, Selective has focused on improving its MySelective mobile app and MySelective online self-service site.

Thanks to the improved design and service experience the app provides, more customers than ever are viewing their policy, reporting a claim, paying their bills, and accessing auto insurance cards digitally. Improvements to the online customer-self-service portal have also increased usage, with more customers registered and more transactions conducted.

There have been direct and measurable business results from these customer-led improvements. With the mySelective app, ratings have increased and it has been recognized by several prestigious mobile app awards. The improvements to online customer self-service have driven a clear reduction in call volume into the call center, as well as increasing customer retention through higher quality, easier customer experiences.



## Smarter Decisions

- App ratings increased to 4.6 stars in 2020 as a direct result of design and service enhancements
- Platinum Award for Best Mobile App Design in the Best Mobile Apps 2020 Summer Awards and winner of the 2021 Gold Stevie Award
- Holistic product changes introduced a cohesive user experience and streamlined process flows.

**4.6 ★★★★★**

2020 App Rating





## Using Golden Rules to deliver extraordinary customer experiences

Visma Software AS provides ERP, HRM, BI and API solutions to the Norwegian market, working closely with partner distributors and using its own direct sales channel. With 380 employees, the company has a clear mission to enable customers to succeed and deliver extraordinary customer experiences. To achieve this, it has implemented its Golden Rules Framework, a comprehensive program that covers all touchpoints and interactions with customers, partners and colleagues.

The Golden Rules Framework allows Visma to become closer to its end customer and drive customer-centricity – changing its culture from the inside out. An extension to its long-term Voice of the Customer program, the Framework closes the loop around customer feedback, and uses customer insight to change or improve its products and processes.

The framework has been designed to create an environment in which customers have the same great experiences whether they interact with customer service, partner service, support, sales, marketing or product development. The Golden Rules also apply internally, boosting culture, team spirit and focus.

The Golden Rules Framework has allowed Visma to transform itself from a product- and business-oriented company into a customer-centric company based on three simple rules: see me, understand me and surprise me. The long-term result is that Visma has become closer to its customers, partners and colleagues, and ensures it remains relevant in a rapidly-changing market.

**“The Golden Rules is our guiding star in order to deliver on our vision of creating a friction-free everyday life for our customers and partners. This set of simple rules have given our employees a toolbox and freedom to really focus on delivering wow experience to customers and colleagues.”**

**Tone Kristiansen**  
NPS Manager

### Richer Insights

- Increased transactional NPS scores across chat and customer success cases, and an increase in promoters
- Golden Button concept for internal sharing of great customer stories, with personal surprises for team members to recognize outstanding experiences
- Company-wide mindset shift to customer-centricity, with 3 out of 4 business objectives for 2021 focused on the customer.

### 3 out of 4

2021 business objectives focused on customer







**“The creative approach to study design and methodology by W5 has provided us with a very unique and powerful solution that allows us to measure both the voice of the consumer and long-term brand advocacy. For the first time, we can quantify the impact of a visit to the Jameson Distillery Bow St. on overall Brand Equity. By capturing visitor Net Promoter Score pre (day 0) and post-visit (day 66) we can tangibly measure the impact of their experience on long term brand advocacy and recommendation.”**

**Sandra Reape**  
Head of Consumer Insight Planning,  
Irish Distillers

## Proving the impact of brand experience on loyalty and advocacy

**Jameson Distillery Bow Street visitor center is an award-winning facility in Dublin that welcomes 360,000 visitors annually. It plays an important role for the Jameson whiskey brand by creating loyal fans and advocates, in addition to delivering financial value. Jameson Distillery Bow Street works with W5, a customer experience agency based in Ireland that specializes in measuring the Voice of the Customer for global brands.**

W5 created a VoC tracker for Jameson Distillery, with the priority aim of providing evidence that this Brand Home has a positive, lasting impact on advocacy and purchase of Jameson whiskey. The tracker gathers feedback from all visitors before their visit, ten days after their visit, and then eight weeks after. As well as delivering insights into the visitor experience and its impact on conversion and loyalty, the tracker also provides an assessment mechanism to ensure high standards of customer experience.

Supporting one of Jameson’s core strategic pillars of Customer Centricity, the tracker drives customer closeness. The insights delivered about customers, coupled with sharing of verbatims in real-time, bring the customer to life for employees. This also allows Jameson to channel feedback to employees to start, stop or continue customer action if issues arise.

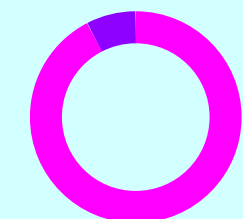
The tracker has shown that the quality time visitors spend within the Brand Home drives true engagement, leading to greater brand advocacy and increased ROI. Before the tracker, the measurement of these factors had been purely anecdotal. Now, Jameson can quantify the positive impact, reinforcing the importance of the Brand Home for team motivation, and highlighting how best to optimize the future visitor experience.

**“Receiving a 2021 ACE Award in Innovation is a great honor. It acknowledges both our focus on technical innovation and human-centered design – two key components at the heart of the program. Working with Forsta, and the Jameson team, we’ve built a world-class Voice of Customer program that provides insights that fuel informed decision-making and action. Receiving the Judges’ Choice for Innovation is particularly gratifying and a great recognition of the program. It spurs us on to continue to build on this exciting program with the Jameson Bow St. team.”**

**Susan Ní**  
Dhubhlaoich, Associate Director, W5

### Richer Insights

- Proved conclusively that visiting Jameson Brand Home has a positive lasting impact on drinking behavior
- Proved that the experience is highly recommended by visitors; over 90% recommend a visit on return to their home country
- In six months, Jameson Brand Home created 57,000 additional Jameson advocates.



**90%**

of visitors  
recommended a visit





# Putting the heart of the customer at the heart of the business

Western & Southern Financial Group, founded in 1888, is the parent company of a group of diversified financial services businesses and subsidiaries offering insurance, investment and retirement to individuals, families, businesses, foundations and non-profit organizations. It employs 3,800 people and works with 84,000 affiliated and independent agents, serving 5.3 million clients and policyholders.

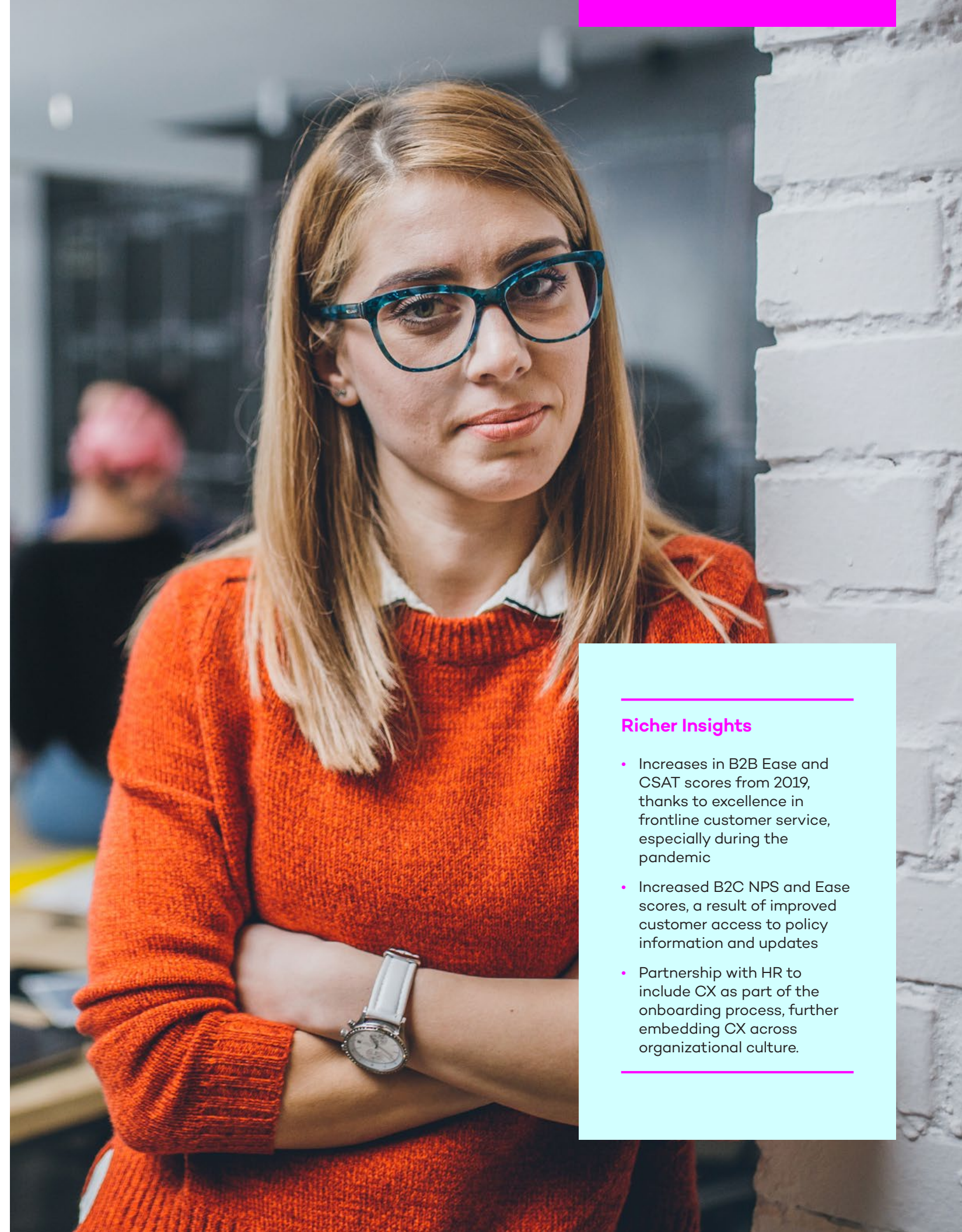
As a large and distributed organization, Western & Southern has the overarching enterprise goal of Ease of Doing Business. To meet this, and to become truly customer-centric, it runs a dedicated Heart of the Customer CX program. This has been designed to bring the authentic voice of the customer inside the business and to provide data-driven insights to support Western & Southern's drive to be a top carrier for both B2C and B2B.

Critically, the program highlights key interactions and touchpoints that are successful, and those that are underperforming, to enable Western & Southern to create the right customer experiences. This drives decision-making across every project and has resulted in wide-ranging business improvements including a faster underwriting process, an improved communications plan, a new plan for claims, and an improved customer portal.

The Heart of the Customer program has delivered measurable business impact for Western & Southern with improved feedback scores across both B2C and B2B audiences. The program has also driven culture change across the organization, with CX scores embedded in all business units, Heart of the Customer feedback used in quarterly business unit meetings, and teams becoming accountable for closed-loop management.

**“Our program is successful because of our team. We have a small team that has pushed all boundaries in an organization that is 130 years old. We are making our leaders accountable and creating champions across the business.”**

**Karina Hernandez**  
CX Strategy Manager



## Richer Insights

- Increases in B2B Ease and CSAT scores from 2019, thanks to excellence in frontline customer service, especially during the pandemic
- Increased B2C NPS and Ease scores, a result of improved customer access to policy information and updates
- Partnership with HR to include CX as part of the onboarding process, further embedding CX across organizational culture.





### About Forsta

Forsta, is the brand for the recently merged businesses of Confrimit and FocusVision, two of the world's leading Experience and Research technology companies. In collaboration with their clients, Forsta informs and inspires designs solutions and deploys their market-leading experience and research technology to exceed their clients' needs. Forsta, growing smarter together. Visit [Forsta.com](https://forsta.com) for more information.

### Find Your Solution with Forsta

Contact Forsta at [info@confrimit.com](mailto:info@confrimit.com) today  
To schedule a free demonstration, and learn how  
Forsta's solutions can work for you.

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