

Cross-Channel Review

HELPING BUSINESS THRIVE ON TECHNOLOGY CHANGE

Multichannel or cross-channel customers spend three to 10 times as much as single-channel customers do — and they have an income that's \$10,000 higher. What's more, the number of cross-channel customers will grow from 32 million today to 45 million by 2005. Firms must deliver consistent, fluent conversations to customers via the Web, phone, and email to win big. How can your company pinpoint weaknesses in your customers' experiences and make improvements that lead to increased profits?

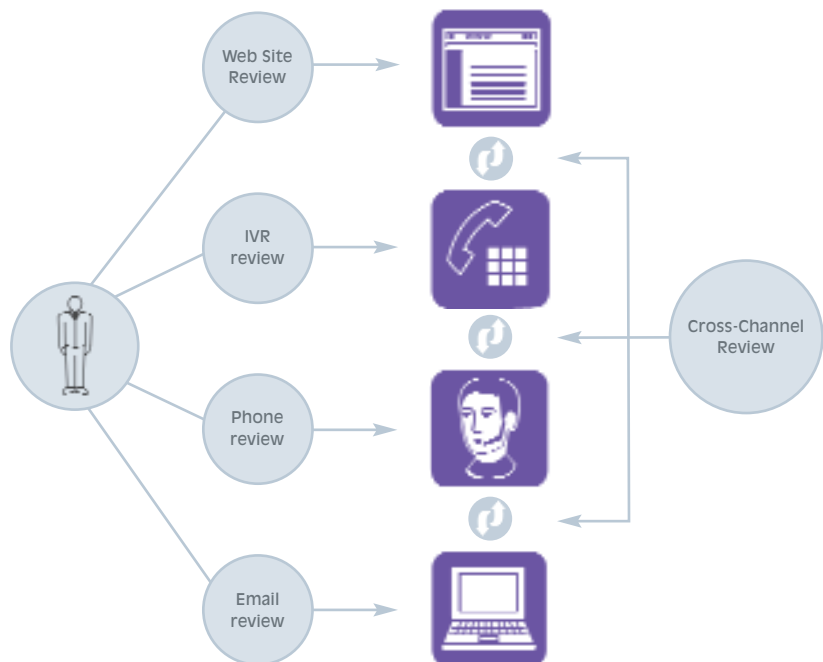
Forrester's Cross-Channel Review delivers an expert, action-oriented evaluation of the experience your firm provides customers across multiple interaction channels. Based on your target customers and their goals, a Forrester analyst uses 50 criteria to review your company's customer channels, including the Web, interactive voice response (IVR), email, and agent-based customer service.

Forrester also assesses your company's ability to smoothly escalate customers from one channel to another. For example, can a Web site customer continue a conversation with a call center agent? With the Cross-Channel Review, you have a clear understanding of where you need to enhance your customer channels and how.

Analyzing Interactions Within And Across Channels

The Cross-Channel Review examines how easily customers can achieve their goals — even when they use multiple channels. To gauge your cross-channel competence, we examine the quality of cross-channel escalation, content consistency, and your firm's ability to support customers while attempting to accomplish their goals.

Examine Interactions Within And Across Channels



Source: Forrester Research, "Exposing Customer Experience Flaws," December 2002

Conducting The Review

A Forrester analyst works with you to complete a background questionnaire detailing the customer personas and cross-channel scenarios that will be used as the basis for the review. The analyst then assumes your target customer persona(s) and conducts the review while attempting to accomplish specific user goals.

























Using the Forrester scorecard's 50 criteria, the analyst checks for compliance with research-based rules and records findings. Results are then distilled into a summary presentation that includes recommended next steps.

In a scheduled conference call, the analyst walks you through the scorecard and presentation and answers your questions directly. From start to finish, you can expect the review to take only three to four weeks.

Quick And Cost-Effective Assessment

Companies may try to understand the issues on their own with surveys, focus groups, measurement tools, and usability tests, but these efforts tend to be costly and time-consuming.

Comparison Of Interaction Assessment Tools

	Time	Cost	Accuracy	Breadth	Comments
Performance monitoring					Provides no insight into a user's success or failure
Usage analysis					Tracks completion rates for user scenarios but only within channels
Usability testing					Reveals barriers that block users from their goals, but recruitment takes time
Customer surveys					Reliable for understanding preference but no insight into actual behavior
Field studies					Most reliable source of behavioral data — but very expensive
Expert reviews					Time- and cost-efficient methods for identifying user experience flaws



Poor



Fair



Good

Source: Forrester Research, "Exposing Customer Experience Flaws," December 2002

Cross-Channel Review Deliverables

Forrester scorecard. You receive an assessment scorecard with detailed commentary based on 50 criteria that rates channel interactions in two ways:

- Across channels, including:
 - Consistency of data.
 - Ease of escalation.
 - Consistency of language.
- Within channels, including:
 - Usability, speed, organization, navigation, clarity, and consistency.
 - Service reliability, support, and ease of completing transactions.
 - Interactivity, personalization, and other tools.

Summary presentation. Your Cross-Channel Review findings are summarized in a PowerPoint presentation with scores, screen shots, comments, and recordings of any interactions. The analyst also uses this presentation to make recommendations and prioritize their importance, so your team can apply the results immediately to your initiatives.

Conference call. To help you make the most of the conclusions and recommendations, the analyst who conducted the review hosts a 2-hour conference call. During the call, you have the opportunity to ask any questions about your scorecard and summary, as well as discuss the steps needed to make the suggested improvements.

Program Options

Competitive cross-channel review bundle. Depending upon your current position, your company may also require competitive insight. With the competitive cross-channel review bundle, Forrester conducts a complete Cross-Channel Review for as many competitors as you choose — delivering competitive information to a degree that equals your own Cross-Channel Review. A spreadsheet that compares your company to each competitor side-by-side on the same criteria is included, in addition to the overview, scorecard, and conference call.

In-person delivery. In place of the final conference call, you can also add an in-person meeting with the analyst who conducted your review. In a face-to-face setting, the analyst is more capable of judging areas of confusion for you or your team and can help you gain more from his or her analysis. Just as with the conference call, all questions about your scorecard(s) and how to proceed are welcome.

“I would definitely recommend it. It helped us put a stake in the ground. If I were to walk into a new business, and I needed to know what are the top 10 things to do, I would do this immediately.”

— eCommerce head of marketing, \$1B+ retail company

Typical Participants

Executives who engage Forrester for the Cross-Channel Review come from an array of industries, such as automotive, CPG, financial services, healthcare, manufacturing, retail, and travel. Typical participants include:

- Chief customer officers.
- VPs of customer service.
- VPs and managers of contact (or call) centers.
- VPs of marketing.
- VPs of eBusiness.
- Business unit directors

For More Information

The Cross-Channel Review is just one of the many research services Forrester offers to help your business thrive on technology change. For more information about Forrester's RoleView™ Research, Data, Consulting, and Community offerings, visit us at www.forrester.com, or call our headquarters at one of the numbers listed.

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