

Case Study

Customer Intelligence Solutions that Substantially Increase Average Ticket Sales

With stagnating growth from new customers, a specialty products retailer with over \$1B in annual sales asked Reality Based Group to design a solution to increase average ticket price. RBG provided them with an integrated suite of customer experience and merchandising solutions including in-person mystery shopping (utilizing proprietary GameFilm® process) and survey tools to determine where improvements in the sales process could be enhanced.

Finding a Breakdown

Utilizing proprietary GameFilm® technology and post-visit survey tools, RBG's mystery shoppers made visits to all company stores over a six-month period, targeting different employees and rating their customer service interactions. Over a six-month data collection and research period, RBG learned that employees were asking customers to purchase additional items only 20 percent of the time, well below the national average of 33 percent. And when employees did suggest additional items, they were not making effective pitches.

The Management Action Plan

RBG implemented a manager action plan with the retailer to improve customer service from the top leadership all the way down to the field level. The goal of the program was to provide a uniform way for leadership to communicate their intent with their employees, give them the necessary skills, and hold them accountable for their new behaviors.

The action plan involved a detailed report and video highlights of sales interactions through a web-based dashboard so all managers could see first-hand where they were missing opportunities. The video also showed interactions that were executed well so that so new training methods could be deployed uniformly across its entire chain of stores.

Over the next six-month period, all store managers were required to continuously meet and train their employees based on the programs employed by RBG. They constantly talked about add-on sales, watched videos, and reported on progress. At the same time, RBG continuously sent mystery shoppers into each location to gauge the success of the action plan and see if they were moving the needle. The effects of the manager action plan provided by RBG have been significant. Within six months, the retailer was able to gauge a 20 percent jump in the average ticket price. The research validated the increase as the employees were now asking for add on sales over 54 percent of the time. With even more opportunity to increase average sales, the retailer is firmly positioned to grow revenues without significantly attracting new customers.

INDUSTRY



Retail

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RESULTS

+ 20%

Increase in Average Ticket Sales

54%

Percentage of Add-On Sales
Inquiries by Employees

Case Study

Results You Can Take to the Bank

A financial institution with over 400 locations wanted to measure their outbound calling programs where bankers were required engage current customers and suggest new products and services, such as new checking accounts, loans, CDs, and other products. They suspected, however, that these calls were not being made consistently, despite the reports in their customer relationship management system—but they had no way to prove it. Reality Based Group™ was tasked to research, design, and implement a customized resource that could measure the effectiveness of their call program.

Recording the Calls

RBG's response was to build a browser-based solution that requires NO hardware or software investment from the client while allowing the bank to document the calls with generated .wav sound files reviewable by management and professional coaches at RBG. RBG coaches would then listen to the calls, score them based on pre-defined criteria, and develop a baseline report where the results could be reviewed directly with management and staff to determine areas of improvement.

Accountability Metrics

Initially, the bank saw a spike in call activity—mostly because they had informed the employees about the new system. Over time, however (and to no one's surprise) the call volume started dropping off and the activity proved to be inconsistent with what was being reported in the CRM system. RBG's tools were able to pinpoint the issue—their middle management executives were not following up appropriately with staff to ensure that the calls were being executed, and they stopped reviewing the calls for improvement opportunities. Upon solid evidence of the break down, the bank was able to implement a new training and accountability program uniform across all of its locations and sales of new products began to improve.

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Finance

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Real Calls

Case Study

Improving People to Create a Better Customer Experience

A nationwide retailer with over 2,000 locations internationally had a goal of developing a measurable increase in their overall customer service and further developing their personnel, but they were unsure as to what metrics to evaluate on an enterprise-wide scale. Knowing that they needed a third party to evaluate their performance, they brought in Reality Based Group™ (RBG) and their suite of training tools and platforms that help companies evaluate customer service metrics and then implement management training to increase the overall performance.

Implementing a Process

RBG knew that they had to develop a process that was going to establish a baseline metric to determine where the opportunities for improvement were. To accomplish this, they developed a mystery shopper survey and sent hundreds of operatives around the world to visit the stores, buy something with a reimbursed per diem, and grade their experience. RBG also developed the survey in conjunction with the retailer so that every question was designed to promote actionable and trainable data points. The retailer also had the option of weighting certain sections heavier based on specific metric values.

And the Survey Says...

RBG's initial evaluation uncovered multiple issues, such as:

- Employees weren't greeting the customers within 30 seconds 58% of the time.
- Cashiers weren't explaining the warranty 61% of the time.
- Cashiers weren't checking ID for credit card purchases 49% of the time.

The Management Action Plan

Six months after implementing the uniform training tools, the customer reported a marked increase in their overall customer service, with application of measured behaviors increasing 50% and a baseline increase from 60 to a top grade of 90. That wasn't the only win for the retailer. They noticed an immediate financial return on investment because the mystery shoppers on average spent 50% more than their reimbursed amounts in the stores, providing an instant increase to the bottom line.

Safety Inspections

As a side program, RBG was able to save the retailer even more money by taking over their safety inspections across all locations. Not only did this give them a discount on insurance, but servicing those safety audits locations requires a substantial investment in resources that the company would no longer have to spend. In addition, because RBG provides a third-party audit, they can aggregate the data across locations to look at trends that the retailer wouldn't be able to spot with their own resources, i.e. if all the first aid kits are missing components, it could be a problem with the vendor and corrective action may be necessary.

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Retail

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Mystery Shopping Plus



Real Feedback

RESULTS

+ 50%

Increase in Measured Behaviors

+ 50%

Increase in Baseline Grade