

Customer Loyalty Report

Business Services | Children's Services | Cleaning &
Janitorial Services | Home Services | Pest Control

Text Analysis of Net Promoter Score Surveys



DATE
10/14/16

Project Goal

To determine the key drivers, barriers, and delighters of the Net Promoter Score (NPS) rating within five different industries.

The end objective is to use the project's findings to create marketing collateral that provides additional value to existing clients and attracts potential clients.

The five industries analyzed in this report are:

- Business Services
- Children's Services
- Cleaning & Janitorial Services
- Home Services
- Pest Control

Methodology

Open end text provided by NPS survey respondents was analyzed.

- A total of 7,533 NPS survey responses (~1,500 responses per industry) were randomly selected from 66 Listen360 client brands⁽¹⁾ within five target industries
- The random sample of NPS survey responses was selected from a six month period between the dates of January 1, 2015 and June 28, 2016
- The same sample size was selected for each brand to ensure even representation of each brand
- Margin of Error⁽²⁾ at 95% confidence is +/- 2.4%

	Business Services	Children's Services	Cleaning & Janitorial Services	Home Services	Pest Control
Number of Brands	7	14	14	16	15
Sample Size Per Brand	215	108	108	94	100
Sample Size Per Industry	1,505	1,512	1,512	1,504	1,500
Total Sample Size	7,533				

(1) List of brands available in the Appendix

(2) Assuming a probability sample, and a total population of >20,000 brands worldwide. Note that it is highly likely that the samples selected are somewhat biased due to the data being sourced only from Listen360 client brands.

Analytical Approach

Touchpoints and Attributes were coded and analyzed to identify which of them were Barriers, Key Drivers, and Delighters of loyalty (NPS).

Step 1: Coding the Text Data

- **Touchpoints** are the places or processes where customers interact with the brand e.g. "the facility"
- **Attributes** are the qualities or characteristics of the experience e.g. "clean/tidy"
- Touchpoints and attributes work together to create an attitude or emotion about the brand, which in turn drives consumer behavior in the form of loyalty...in our case, how likely they are to recommend the brand
- Positive and negative sentiment of each touchpoint and attribute were coded separately e.g. "clean/tidy" and "dirty/untidy"

Step 2: Analyze Sentiment by Loyalty

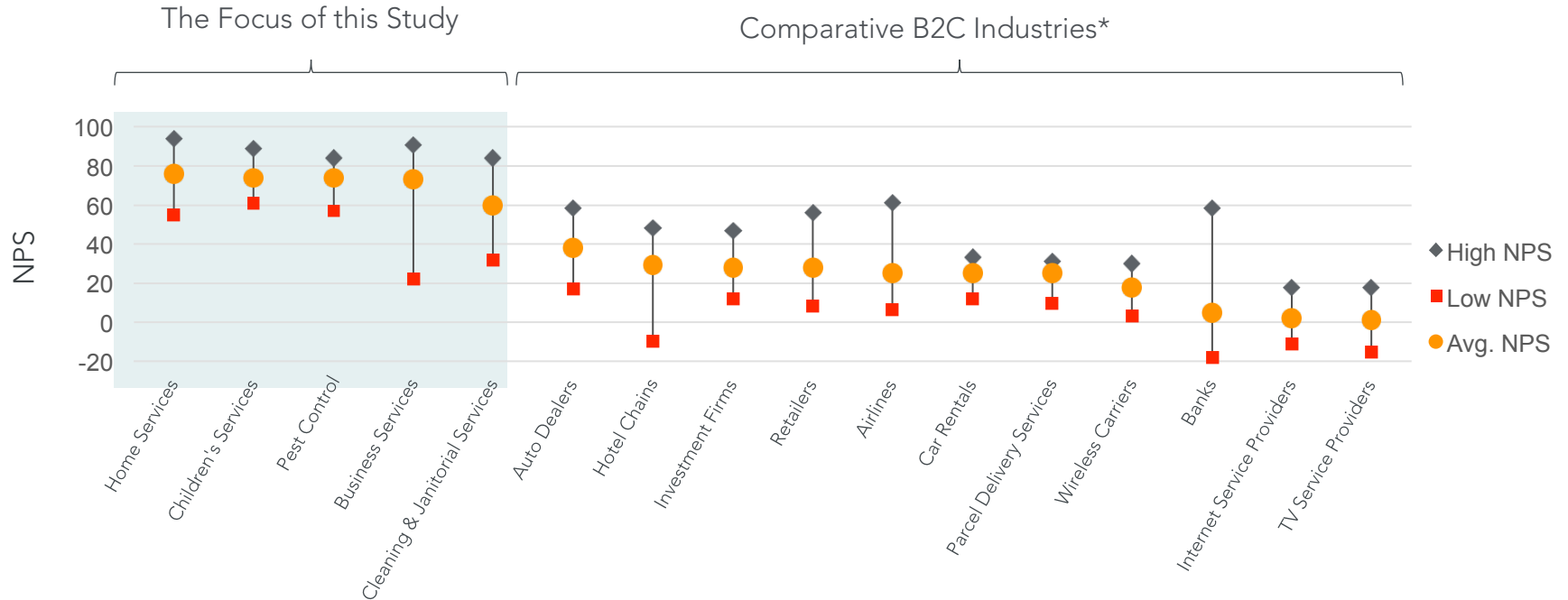
- **Barriers** are minimal expectations, that dissatisfy when performed poorly, with no effect if great
- **Delighters** are "wow factors" that drive loyalty up when performed well, with no effect if subpar
- **Key Drivers** work both ways: decreasing loyalty when performed poorly, and increasing loyalty when performed well.

% Mentions by...	Detractors	Passives	Promoters	Detractors	Passives	Promoters
Barrier	●	●	●	--	--	--
Delighter	--	--	--	●	●	●
Key Driver	●	●	●	●	●	●
	Negative Sentiment			Positive Sentiment		

Summary and Recommendations

Range of NPS Scores Across Industries

Average NPS is higher for industries in this study



*Our study focuses on five service industries. See the Methodology slide for more information.
Comparative B2C Industry data is sourced from the "Temkin Group Q3 2014 Consumer Benchmark Survey."

Summary: Barriers

Overall, across four of these different service industries, poor communication is a top dissatisfier in the experience, creating a barrier to loyalty.

Other barriers rising to the top in at least two of these industries include:

Not delivering on promises, being dishonest, not offering good value or being too expensive, and not listening to and understanding customers' needs

Top 5 Barriers By Industry

Business Services	Children's Services	Cleaning & Janitorial Services	Home Services	Pest Control
<u>Communication Ability</u>	Value/Price	<u>Communication Ability</u>	<u>Communication Ability</u>	Value/Price
Deliver on Promises	Consistency	Honesty	Deliver on Promises	<u>Communication Ability</u>
Ability to Achieve Results	Responsiveness	Listen to/Understand Customers' Needs	Thorough	Booking/Scheduling Process
Payment/Billing Process	Listen to/Understand Customers' Needs		Issue Resolution	Convenience
Experience/Knowledge	Efficient with Time		Honesty	Competence/Accuracy

Summary: Key Drivers

The service that is delivered, and/or the service provider are most important

Key attributes that are consistent key loyalty drivers in these industries include:

Being on time, efficient or quick when providing the service, professionalism, and getting the expected, effective results

Top 5 Barriers By Industry

Business Services	Children's Services	Cleaning & Janitorial Services	Home Services	Pest Control
Efficient with Time	The Teachers/Instructors/Coaches	The Service Provided	The Service Provided	The Service Provided
The Service Provided	Ability to Achieve Results	The Service Provider	Efficient with Time	Efficient with Time
Friendliness	Fun	Efficient with Time	The Service Provider	The Service Provider
Products/Materials	Friendliness	Ability to Achieve Results	Professionalism	Ability to Achieve Results
Value/Price	Organization/Management	Professionalism	Products/Materials	Professionalism

Summary: Delighters

Delighters in the service industry mostly relate to how the service providers interact with their customers

'Politeness' is a delighter in four of the five industries, along with 'kindness/compassionate' for children's services

'Helpfulness' and 'Friendliness' are also commonly mentioned

Top 5 Barriers By Industry

Business Services	Children's Services	Cleaning & Janitorial Services	Home Services	Pest Control
Helpfulness	The Lesson/Class/Curriculum	Friendliness	Friendliness	Friendliness
<u>Politeness</u>	The Employees/Staff	Cleanliness	<u>Politeness</u>	<u>Politeness</u>
Reliability/Dependability	Kindness/Compassion	<u>Politeness</u>	Ease of Use	Helpfulness
	Variety/Options	Ease of Use	Helpfulness	Product/Materials
	Personalized/Unique			Ability to Explain

Research Findings

BUSINESS SERVICES

NPS Barriers, Key Drivers, and Delighters

Top loyalty drivers are being efficient with time, and the service provided

Touchpoints

Barriers	Key Drivers	Delighters
Payment/Billing Process	The Service Provided	
Booking/Scheduling Process	Products/Materials	
	The Employees/Staff	
	The Service Provider (Driver, Installer, etc)	

Attributes

Barriers	Key Drivers	Delighters
Communication Ability	Efficient with Time	Helpfulness
Deliver on Promises	Friendliness	Politeness
Ability to Achieve Results	Value/Price	Reliability/Dependability
Experience/Knowledge	Quality	
Listen to/Understand Customers' Needs	Level of Customer Service	
	Ease of Use	
	Professionalism	
	Responsiveness	
	Issue Resolution	
	Convenience	

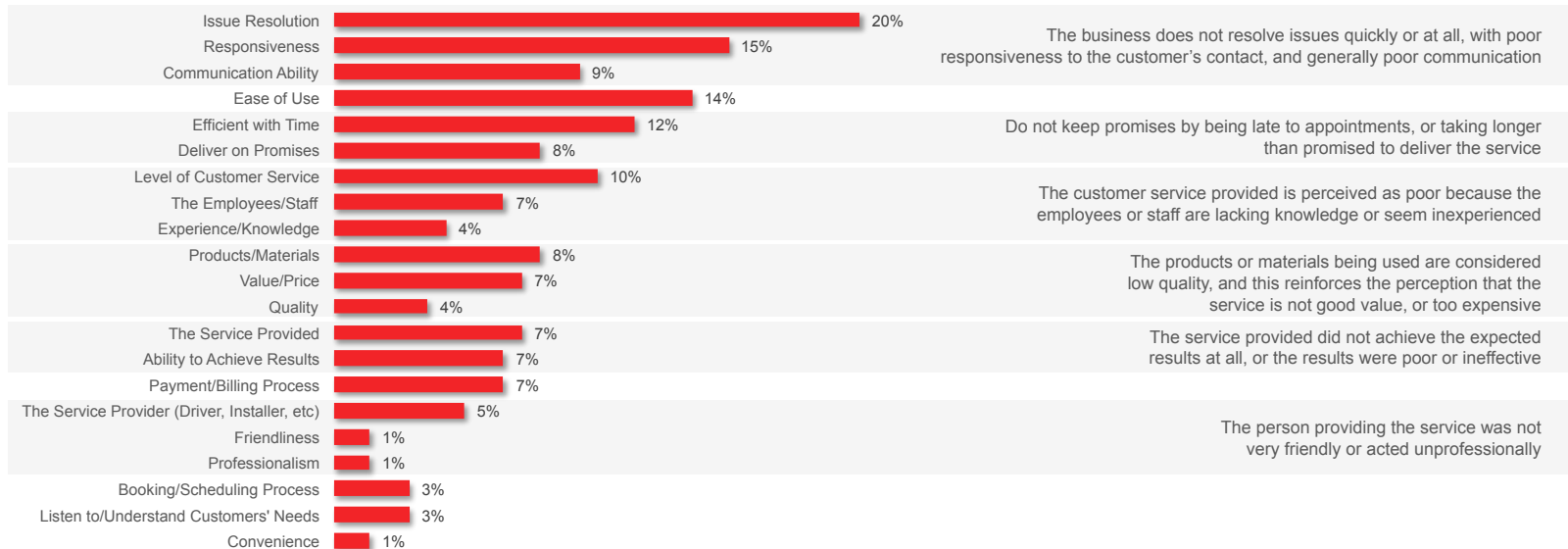
Touchpoints/attributes must be mentioned by 20 or more respondents to be included in the analysis. *Barriers, Key Drivers, and Delighters are determined from statistical comparison of Detractors, Passives, and Promoters at 95% confidence level. Barriers negatively affect NPS when performed poorly or are absent, but do not drive it to increase when performed well. Key Drivers negatively affect NPS when performed poorly or are absent, AND drive NPS up when performed well. Delighters increase NPS when performed well, but do not negatively affect NPS if absent or performed poorly.

Negative Experiences to Avoid

Most vital to maintaining customer satisfaction is issue resolution. Be responsive and communicate with customers, ensuring their issues are resolved properly.

Top Negative Mentions By Detractors

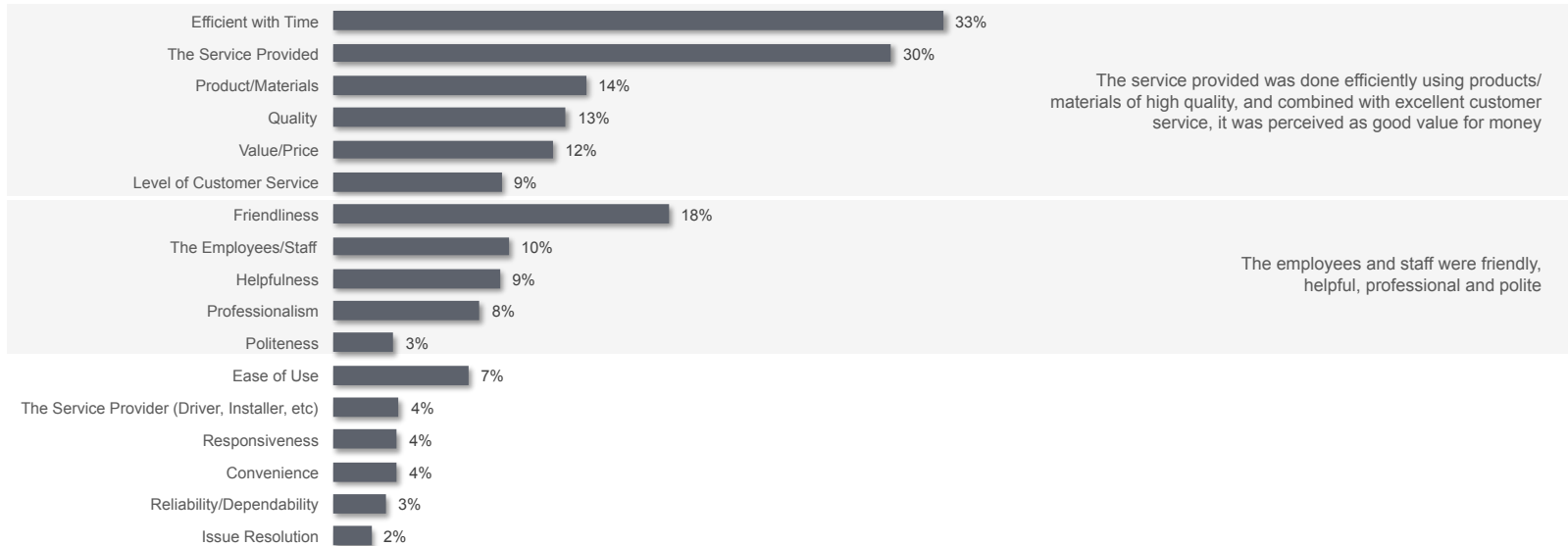
Themes Within the Negative Comments



Positive Experiences that Drive Loyalty

Provide high quality, service, and efficiency at a good price to drive loyalty.
Ensure employees are friendly, helpful, professional, and polite.

Top Positive Mentions By Promoters



Research Findings

CHILDREN'S SERVICES

NPS Barriers, Key Drivers, and Delighters

The teachers/coaches, lesson/curriculum/and achieving results are key

Touchpoints

Barriers	Key Drivers	Delighters
Management	The Teachers/Instructors/Coaches	The Lesson/Class/Curriculum
Booking/Scheduling Process	The Atmosphere/Environment	The Employees/Staff
Equipment	Newsletter/Email	The Facility/Space

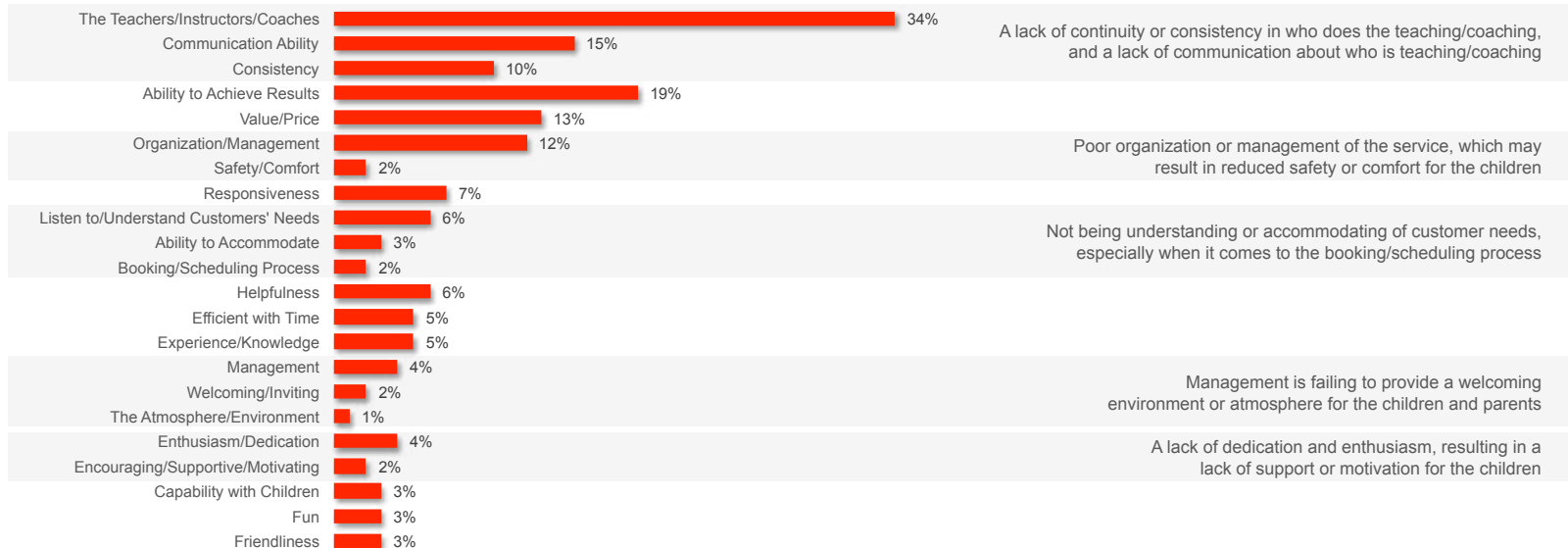
Attributes

Barriers	Key Drivers	Delighters
Value/Price	Ability to Achieve Results	Kindness/Compassion
Consistency	Fun	Variety/Options
Responsiveness	Friendliness	Personalized/Unique
Listen to/Understand Customers' Needs	Organization/Management	Convenience (Location)
Efficient with Time	Level of Engagement/Excitement	Energy Level
Informative	Cleanliness	Attentiveness
	Safety/Comfort	Patience
	Capability with Children	Personal
	Ability to Accommodate	
	Professionalism	
	Communication Ability	
	Welcoming/Inviting	
	Enthusiasm/Dedication	
	Experience/Knowledge	
	Encouraging/Supportive/Motivating	
	Helpfulness	
	Age-Appropriateness	
	Competitiveness/Intensity	

Negative Experiences to Avoid

Dissatisfaction is mostly caused by lack of consistency and communication about or from the teachers, followed by lack of results.

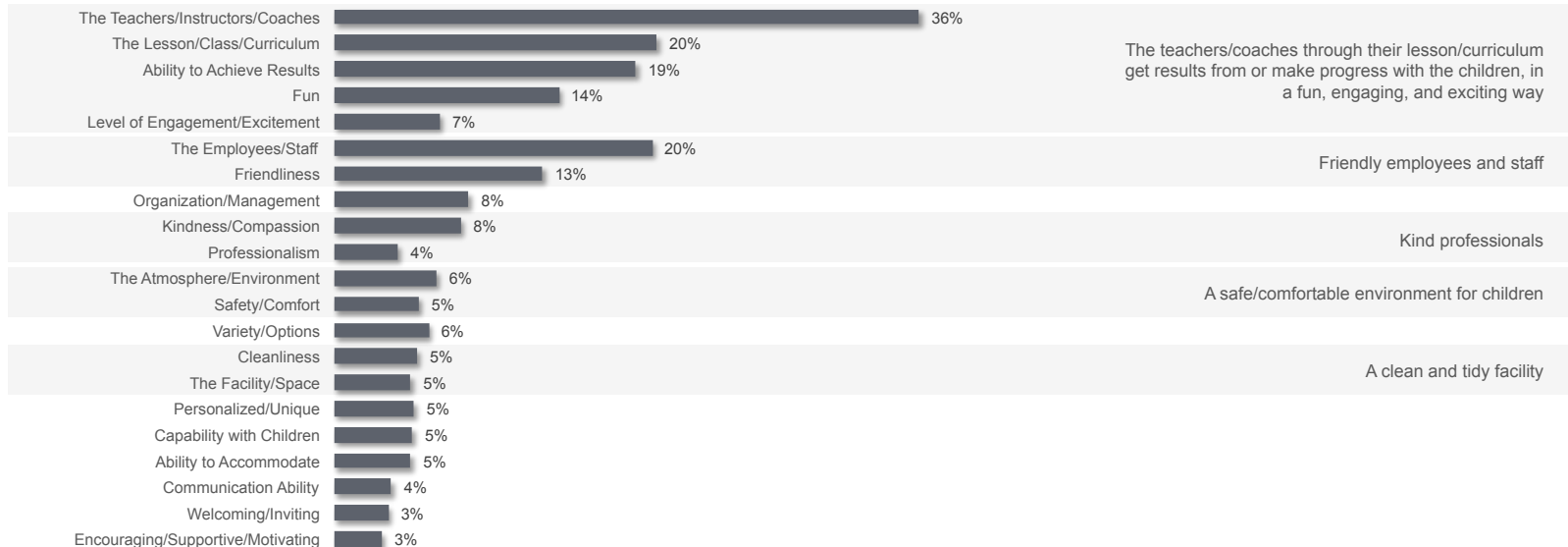
Top Negative Mentions By Detractors



Positive Experiences that Drive Loyalty

Fun, engaging teachers and lessons that get results drive loyalty. Ensure employees are friendly, kind, and professional, and the location is safe and clean.

Top Positive Mentions By Promoters



Research Findings

CLEANING & JANITORIAL

NPS Barriers, Key Drivers, and Delighters

Top loyalty drivers are being efficient with time, and the service provided

Touchpoints

Barriers	Key Drivers	Delighters
	The Service Provided (The cleaning)	
	The Service Provider (Cleaner, Janitor)	
	The Employees/Staff	
	Products/Materials	
	Booking/Scheduling Process	

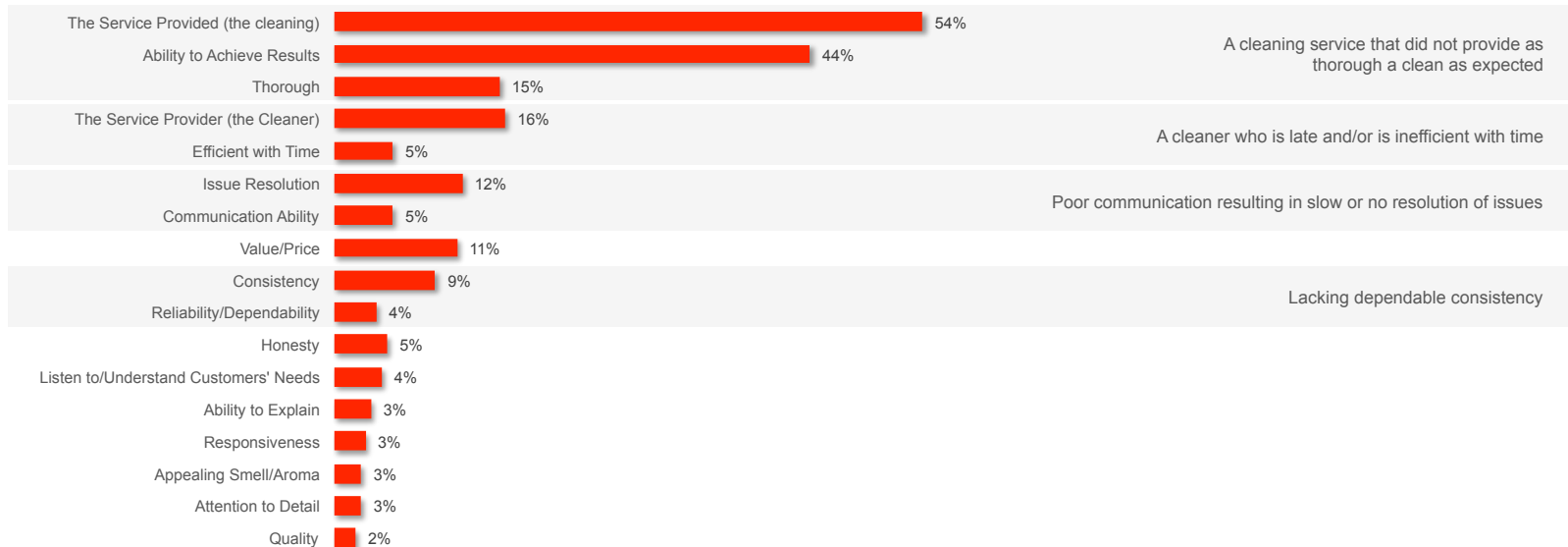
Attributes

Barriers	Key Drivers	Delighters
Communication Ability	Efficient with Time	Friendliness
Honesty	Ability to Achieve Results	Cleanliness
Listen to/Understand Customers' Needs	Professionalism	Politeness
	Thoroughness	Ease of Use
	Consistency	
	Reliability/Dependability	
	Value/Price	
	Issue Resolution	
	Appealing Smell/Aroma	
	Attention to Detail	
	Quality	
	Responsiveness	
	Level of Customer Service	
	Ability to Accommodate	
	Ability to Explain	
	Experience/Knowledge	

Negative Experiences to Avoid

A cleaning service that is subpar is a major cause of dissatisfaction. A cleaner who is late and inefficient with time, and poor communication about issues also dissatisfy.

Top Negative Mentions By Detractors

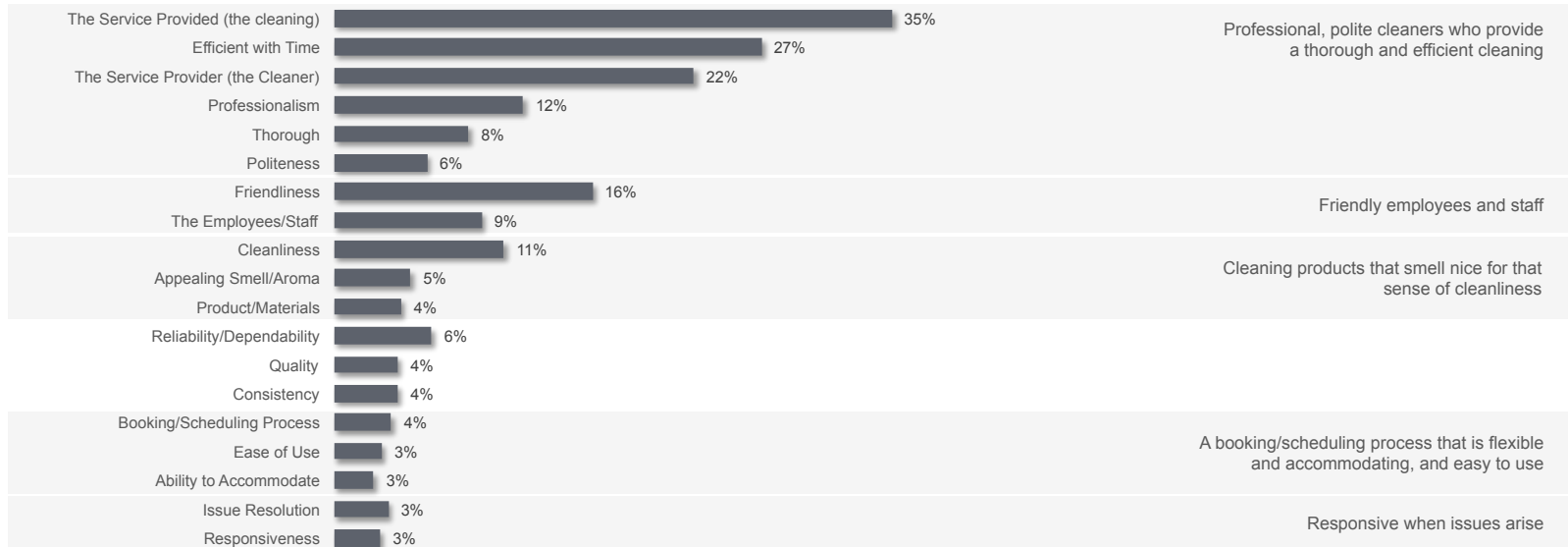


Positive Experiences that Drive Loyalty

A positive, loyalty-driving experience is one where the cleaner is polite and professional, and the cleaning is thorough and efficient.

Top Positive Mentions By Promoters

Themes Within the Positive Comments



Research Findings

HOME SERVICES

NPS Barriers, Key Drivers, and Delighters

The top drivers are the service provided, and being efficient with time

Touchpoints

Barriers	Key Drivers	Delighters
	The Service Provided	
	The Service Provider (Builder, Handyman, etc)	
	Products/Materials	
	The Employees/Staff	

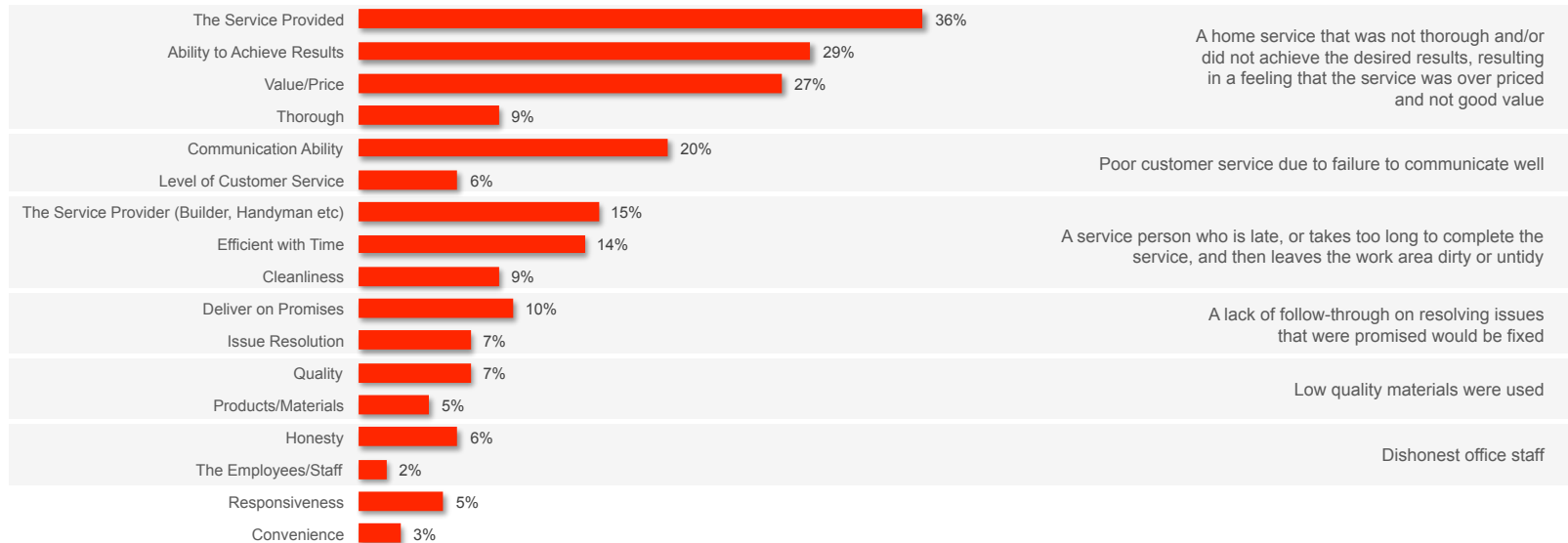
Attributes

Barriers	Key Drivers	Delighters
Communication Ability	Efficient with Time	Friendliness
Deliver on Promises	Professionalism	Politeness
Thorough	Value/Price	Ease of Use
Issue Resolution	Quality	Helpfulness
Honesty	Ability to Achieve Results	
Convenience	Experience/Knowledge	
Reliability/Dependability	Cleanliness	
Attention to Detail	Responsiveness	
Fairness	Level of Customer Service	
	Ability to Explain	
	Listen to/Understand Customers' Needs	

Negative Experiences to Avoid

Highest dissatisfaction occurs when the home service fails to achieve the expected result, or the work wasn't completed, leaving a sense of feeling cheated .

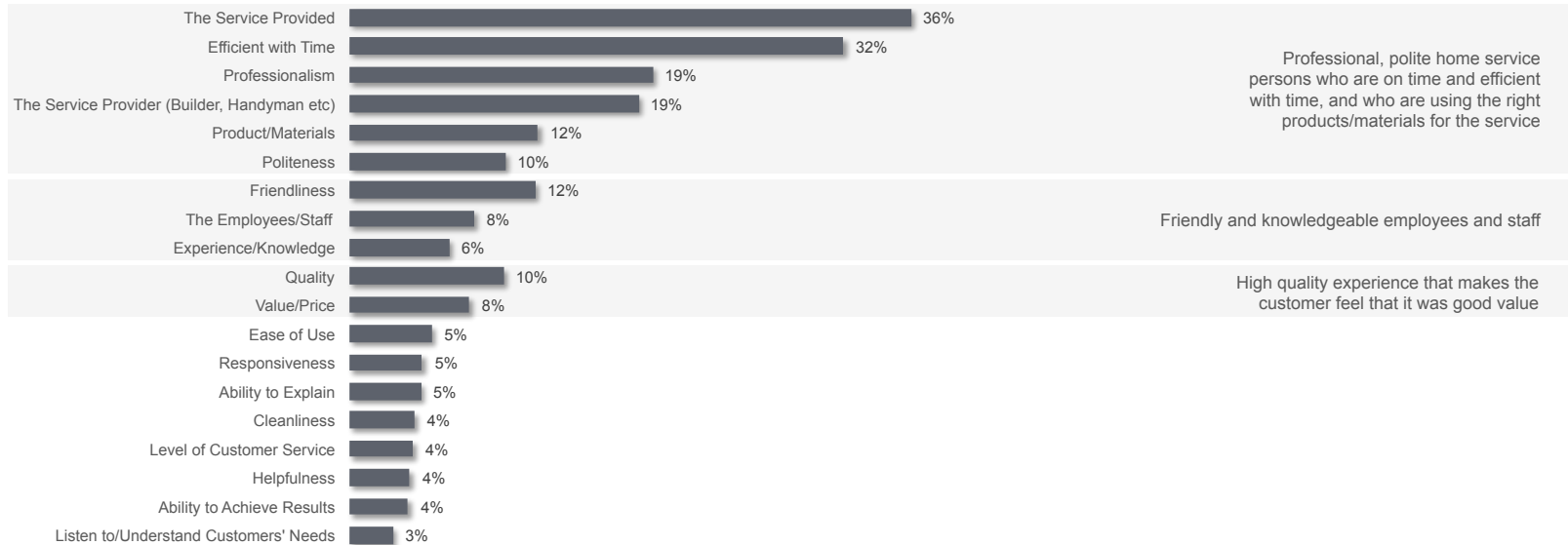
Top Negative Mentions By Detractors



Positive Experiences that Drive Loyalty

The service, the service provider, and the products/materials used are key. Service providers need to be professional and polite, while staff should be friendly and knowledgeable.

Top Positive Mentions By Promoters



Themes Within the Positive Comments

Professional, polite home service persons who are on time and efficient with time, and who are using the right products/materials for the service

Friendly and knowledgeable employees and staff

High quality experience that makes the customer feel that it was good value

Research Findings

PEST CONTROL

NPS Barriers, Key Drivers, and Delighters

The service and efficiency drive loyalty; booking process can be a barrier

Touchpoints

Barriers	Key Drivers	Delighters
Booking/Scheduling Process	The Service Provided	Products/Materials
	The Service Provider (Technician)	
	The Employees/Staff	

Attributes

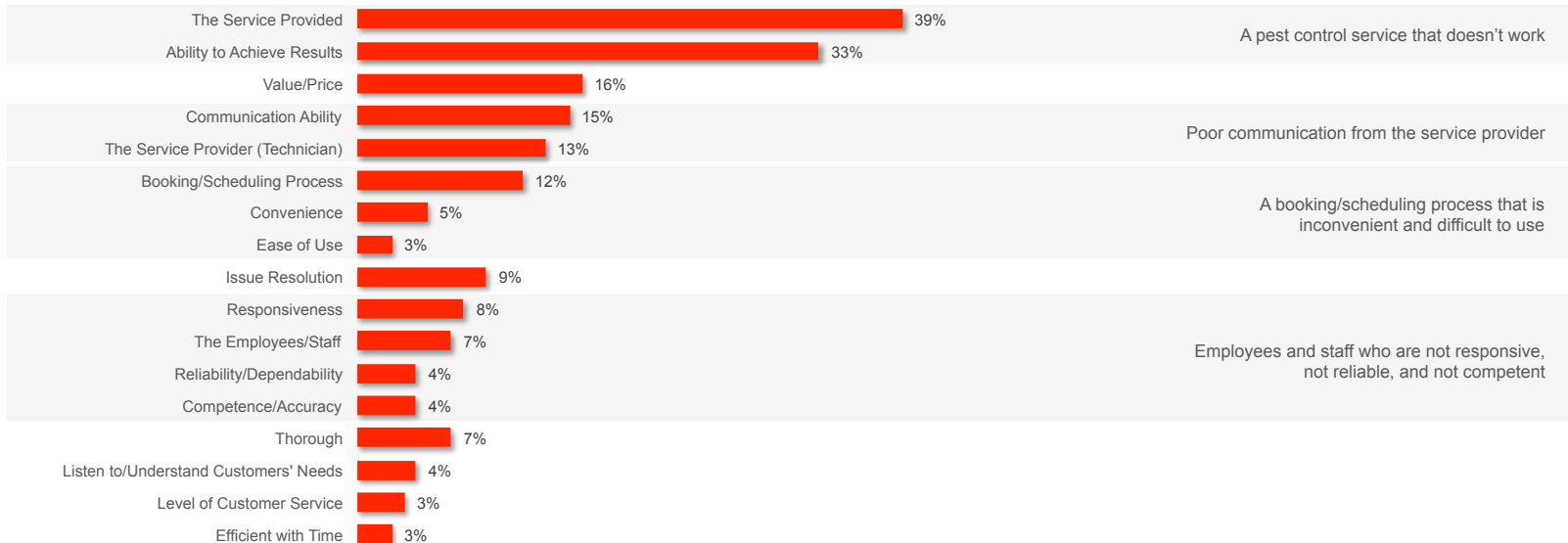
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Value/Price	Efficient with Time	Friendliness
Communication Ability	Ability to Achieve Results	Politeness
Convenience	Professionalism	Helpfulness
Competence/Accuracy	Experience/Knowledge	Ability to Explain
Ability to Accommodate	Reliability/Dependability	
	Responsiveness	
	Issue Resolution	
	Thorough	
	Level of Customer Service	
	Listen to/Understand Customers' Needs	
	Ease of Use	

Negative Experiences to Avoid

Pest control services have to deliver results for a good price. Good communication from the technician, and an easy to use, convenient scheduling process are key.

Top Negative Mentions By Detractors

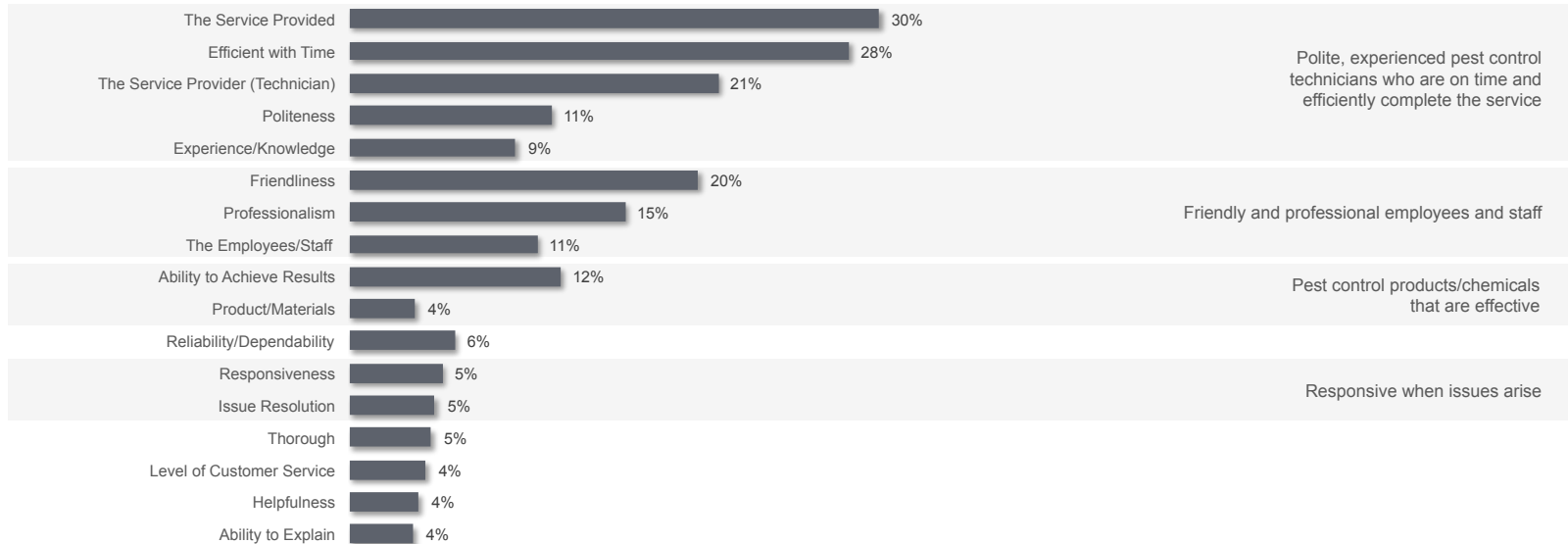
Themes Within the Negative Comments

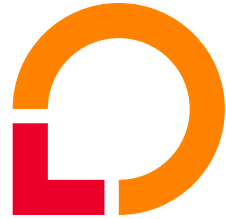


Positive Experiences that Drive Loyalty

A positive pest control experience is one where the service is completed efficiently by an experienced, polite technician.

Top Positive Mentions By Promoters





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