CEMindex 2015
CEOs ON A JOURNEY TOWARDS CUSTOMERS AND INNOVATION

Rambøll
CEMindex 2015

For the sixth year in a row, CBS/the Department of Marketing and Ramboll Management Consulting have compiled the CEMindex. This survey describes Danish companies’ focus on customer experiences, and studies the business impact of investing in customers.

Approximately 600 companies took part in the survey, which has targeted mainly CXOs as well as heads of Sales & Marketing, Business Development and Strategy, as well as HR and other relevant leaders.

This year’s survey model differs from previous years’ as new dimensions and questions have been added. These changes were made based on both a research perspective and Ramboll’s experience gained while implementing more than 100 projects in the field. Due to the revised model and questions, there have been fewer opportunities for comparison with previous CEMindex publications.

Ramboll Management Consulting is a leading specialist in providing advice on increasing growth and revenue through focusing on customers and the market. Ramboll’s surveys provide in-depth insight into customers and the market, strategy formulation and implementation activities.

Our advice is supported by research-based concepts, tools and best practices from many years of practical experience in the field. Ramboll’s consultants specialise in rapidly grasping complex business problems and creating unique solutions based on differentiation and unique services that create measurable bottom-line results.

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OUR CUSTOMERS INCLUDE


PUBLISHING
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THANK YOU
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Vice President, Tivoli Branding & Communications Dorte Weinkouff Barsøe, Customer Experience Manager Ida Dyhr, Tivoli
Commercial Development Manager Maj Trige Andersen, Metroskabet
Commercial Director Peter Krogsgaard, Head of Commercial Excellence Marion Lobedanz Withøft, Copenhagen Airports
Vice President Consumer Excellence Thomas Bruhn, Coloplast
Commercial Director Peter Oxholm Zigler, Autobutler
Director PR & Communication, Nordic Ole Sarang, Carlson Rezidor Hotel Group

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DIFFERENTIATION THROUGH CUSTOMER-DRIVEN INNOVATION
Customers still top the strategic agenda with most Danish leaders, closely followed by innovation. These are the conclusions of this year’s CEMindex 2015, which has just been completed as a research collaboration between Ramboll Management Consulting and Copenhagen Business School, CBS.

NEW BUSINESS MODELS

After some years of crisis management, cost cutting and efficiency improvements, followed by a period of “fix the basics”, the time has come to be more proactive and create genuine differentiation through customer-focused innovation and designing new business models.

Danish captain of industry A. P. Møller tells us to “Differentiate through technology and innovation”. Coloplast places responsibility for innovation with marketing and no longer with R&D in order to be closer to the customer and has developed Coloplast Care to improve customers’ life quality. Danfoss is working with customer-orientation and innovative solutions within sales, marketing and service, and Falck wants to be there for its customers, also before accidents occur.

INNOVATION THROUGHOUT THE ENTIRE CUSTOMER JOURNEY

Innovation is no longer a question of new products, but now permeates throughout the entire customer journey from marketing, through sales, advice, delivery, logistics – all touch points with the customer. Disruption is a new word that managements are already facing through new competition from agile young companies with new initiatives for fulfilling customer needs or creating new needs. Or perhaps they have helped to disrupt their own sectors. Companies such as Nemlig.com, Mofibo, Autobutler and many more spring to mind, but also large and established companies such as Apple, Tesla and Google are changing familiar thought patterns.

SHARED VISION AND STRONGER RESULTS

Customer focus and innovation are intended to create genuine differentiation through better customer experiences, or “magic moments” as Copenhagen Airports calls them, and they improve top and bottom lines. This year’s CEMindex once again documents that boosting efforts by 10% on all the CEM dimensions strengthens market performance by +7% and increases financial results by +5%.

However, who takes responsibility for developing new customer-oriented experiences for customers? Not surprisingly, Sales, Marketing and Service are high on the list of those with the greatest focus on creating better customer experiences. More surprisingly, Production, HR and Product Development are far down the list. It therefore appears that individual companies are still struggling to coordinate work on producing good customer experiences under a shared corporate vision.

After customer-driven innovation, which is the strongest driver, it appears that creating a customer culture and management focus throughout the whole company is one of the most important drivers for improved customer experiences, closely followed by recruiting employees who understand what customers want and need.
TRENDS IN CEMindex 2015
CUSTOMER FOCUS GENERATES BOTTOM-LINE GROWTH
DOCUMENTED COMMERCIAL EFFECT OF GOOD CUSTOMER EXPERIENCES

SURVEY MODEL

The research project “Return on Customer Experience Management” has been carried out once a year since 2010 in cooperation with CBS and Ramboll Management Consulting. The survey model identifies six dimensions that together describe relevant action areas in the field of CEM. Based on experience gained from previous years, this year the survey model has been revised to provide the best possible picture of the most effective CEM areas.

COMMERCIAL POTENTIAL

CEMindex 2015 once again documents a clear positive link between the CEM initiatives, companies’ scores for the overall customer experience, ability to differentiate themselves, market performance and financial results. The model below, which is calculated in cooperation with CBS, this year shows that a +10% improvement in

| Customer culture and anchoring in the top management |
| Customer-oriented management |
| Customer touch points and customer experience goals |
| Customer insight |
| Customer-driven innovation |
| Recruitment and development |

The six dimensions are based on a number of questions in each area. The questions are also revised in relation to the latest survey from 2014. In addition, the survey model has been expanded to include the dimension “Customer experiences”, which together with differentiation, market performance and financial results describe the result side of the model.

| Customer experiences |
| Differentiation |
| Market performance |
| Financial results |

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| Customer experience management |
| Customer experiences |
| Differentiation |
| Market performance |
| Financial results |

The companies’ CEMindex strengthens the overall customer experience by +9% and differentiation by +7%. The effect of the strengthened differentiation is growth of +7% in market performance and +5% in financial results. In other words: CEM pays off.
THE JOURNEY BEGINS BEFORE TAKE-OFF

It is not just a banal few hours of transport to get over and done with. By far the majority of passengers feel their holiday begins or they have a breathing space during a business trip when arriving at the airport. This attitude opens up a cockpit of opportunities for pressing the right CEM buttons at Copenhagen Airports, which is reaping international recognition for raising its travel experience to new magic heights.

By Jesper Toft Madsen

Perhaps you know the feeling. The moment you roll the trolley through the revolving door and into the entrance hall, you are free. Whether you are standing expectantly on the threshold of a long-awaited holiday or simply enjoying your daily breathing space on your way to the office in Stockholm, the airport is an important part of the journey for up to two-thirds of the passengers.

This feeling might surprise the last third, the efficiency segment, who just want to get through the airport – and the faster the better. Nevertheless, this is a dominant attitude that pays off for Copenhagen Airports. With over 70,000 travellers a day, it is good business that visitors view the airport that more than just an airport.

“Many holidaymakers use the airport to spoil themselves, plan their journey or enjoy a cup of coffee. And many business passengers consider it time they are stealing for themselves e.g. to buy a new shirt or avoid trekking to a local shopping centre to find a present for their mother next weekend. Only one in three want to drive straight to the plane, while ten per cent are so unused to travelling that they don’t benefit much from what the terminal has to offer,” explains Marion Lobedanz Witthøft, Head of Commercial Excellence at Copenhagen Airports.

“We must serve everyone – from the sausage stall to Joe and the Juice, sushi and a steak at MASH. Some people buy watches for DKK 75,000 before travelling, and others buy three pairs of socks for DKK 79.00. We must be careful not to box ourselves in.”

Peter Krogsgaard, Copenhagen Airports

THE BOTTOM LINE BUSINESS

Once again this year, CEMindex documents the positive correlation between customer experiences, differentiation and financial results.

It seems that Copenhagen Airports has managed to exploit
the majority’s attitude to creating experiences that have a positive impact on customer satisfaction, the bottom line and not least reputation.

Overall, departing guests’ satisfaction rose two points last year to 86 out of 100. For the first time in the airport’s 90-year history, the annual passenger total rounded 25 million, and the 6.5% increase was the main reason that the company was able to present one of the highest growth rates among the major European airports in 2014. The airport also won a number of international awards, including “The World’s Best Airport Processing”, “Best Airport in Northern Europe”, “Most Efficient Airport in Europe” and “Most Punctual Airport in the EU”.

THE BEST PART OF THE JOURNEY

Naturally, the impressive results conceal a great deal of hard work behind the scenes. The current strategy, World Class Hub, was launched in 2012 with the vision of being the preferred “gateway” to Northern Europe. The management has prioritised the ability to deliver extraordinary customer experiences as one of three strategic cornerstones for achieving the goal.

However, responsibility for encouraging passengers to prefer Copenhagen Airports and giving them a consistently good experience lies as much with the check-in desk and security control as with Executive Management. In order to ensure consistency, Copenhagen Airports has defined which experiences guests should have across all touch points.
“Our strategic ambition is to be the best part of the journey. We want to create the joy of travel for our passengers by being good, attentive and hospitable hosts who make an effort, go the extra mile and treat our guests as we would at home. We are one of the few companies that has the courage to have pride as a value,” says Commercial Director Peter Krogsgaard.

“Pride is one side of the coin and arrogance is the other. But we don’t see the latter in our employees. On the contrary, we are both proud and humble to be serving a higher purpose by playing an important role in Denmark’s infrastructure, as a hub connecting us with the rest of the world.

The airport’s focus on the importance of employees for customer experiences reflects the general development in CEMindex 2015 – the highlight of the year among the CEM dimensions is “Recruitment and development”, which has jumped from sixth to second place among the factors that have greatest influence on differentiation and results.

**SECURITY HAS THE GREATEST POTENTIAL**

In order to identify where the other drivers for excellent experiences are located, Copenhagen Airports has conducted careful preparation through customer journey mapping and touch point surveys. The place that passengers experience as being of most importance and where the employees can make the biggest difference is the security check.

“We can perform exceptionally well in terms of security because people are most stressed and expectations are therefore low at this touch point. We are one of the only airports in the world to have outsourced our security check. We want service staff who display empathy and are emotionally intellectual.”

“They must be able to read people and judge when to smile at a nervous and slightly confused passenger to take the anxiety out of the situation, and when to keep an extra eye on the passenger with the furtive glance and fulfil our role as authority figures by ensuring that no one and nothing enters the aircraft that could threaten safety,” says Peter Krogsgaard.

“We know we can’t excel at everything. That makes no sense from a business perspective. We must do what is relevant for the individual and raise the experience above the minimum expectation. We have different archetypes passing through so not everything is relevant for everyone,” he emphasises.

**THE HOME OF PARTNERSHIPS**

It is precisely this fragmented spectrum of passengers and customers that are a core element of working with CEM at an airport. In addition to the many types of passengers, it is also a challenging prerequisite that the airport’s own employees comprise just 10% of the total staff.

The remainder are partners and concessionaires divided into different areas such as food & beverage, retail and shopping, aircraft ground handling providers (who empty aircraft, ed.), cargo operators and, naturally, large airlines such as SAS and Norwegian.
All of them are ambassadors who meet passengers and must have the same understanding of the airport’s hospitality requirements. However, they are also customers to be served and respected by Copenhagen Airports in line with the passengers in order to maintain competitiveness and attract major brands, more routes and jobs.

“It can be difficult to guess what such customer types consider to be good experiences, so we take a relatively straightforward approach and ask them,” says Peter Krogsgaard.

Marion Lobedanz Witthøft explains:

“We’ve defined touch points for all customer types, both B2C and B2B. In recent years, we have implemented over 80,000 interviews a year. These continuously improve our insight into the needs of the various segments. I like to ask all B2B customers: ‘Imagine you have a bag of money. Where would you invest it in the airport so that you benefit most?’ This encourages them to say what is most important to them and in that way we can create magic moments.”

Through working with CEM, Copenhagen Airports has collected valuable insight and data from the different customer segments that, together with the technological developments, enable the airport to develop its business. Our automatic self-service check-in and bag drop are among the B2C initiatives that have boosted satisfaction scores most.”

The next major step for B2B customers is a brand new data- and screen-based form of advertising that will ensure it is even more attractive to advertise at the airport.

THREE MAGIC MOMENTS

Copenhagen Airports works with the term “magic moments”, which is not meant in the sense of flowery poetry or conjuring acts. It could actually mean the small, situation-based details that passengers remember:

- The security guard who holds the baby while the mother puts her things on the conveyor belt
- The shop assistant who sews a button back on a shirt for a busy businessman
- The check-in lady who takes time to clip a passenger’s papers together.

98,674 passengers, 27 June was the busiest day in 2014

Head of Commercial Excellence
Marion Lobedanz Witthøft,
Copenhagen Airports
THE BEST ARE GETTING BETTER – THE WORST ARE GETTING WORSE

The development in the overall CEMindex reflects that the companies’ work on improving customer experiences has declined slightly from 68 in 2014 to 66 in 2015.

Measured in terms of top and bottom line performance, the decline covers an interesting development among the high-performing and low-performing companies. The distance between the companies with good financial results (top 20%) and companies with poor financial results (bottom 20%) is growing larger and larger.

While the companies with strong financial results have further strengthened their focus on customer experiences from 75 in 2014 to 79 in 2015, the opposite trend applies among low-performing companies. Here the CEMindex has fallen from 57 in 2014 to 50 in 2015.

The trend illustrates that the companies must take working with customer experiences seriously as a discipline in order to produce commercial benefits that can potentially be realised.

“When we meet customers’ needs and occasionally exceed them, they want more contact with us. We are not philanthropists – we know that we can only run a good business by having satisfied customers. It is vital that the experience is reliable and consistent. What can appear so effortless often conceals a lot of hard work with detailed surveys and insight, weighting of needs and symptoms, and a plan of execution: Execute and measure, execute and measure.”

Commercial Director Peter Krogsgaard, Copenhagen Airports
GROWTH COMES TO THOSE WHO DELIVER EXPERIENCES SUCCESSFULLY

A clear trend in this year’s CEMindex is that companies that succeed in differentiating themselves in terms of good customer experiences also increase their market shares.

“We perform better than our competitors in terms of market share”

- 20% of the companies with the strongest differentiation: 71%
- 20% of the companies with the weakest differentiation: 19%

Not surprisingly, revenue follows alongside.

“We perform better than our competitors at creating growth”

- 20% of the companies with the strongest differentiation: 73%
- 20% of the companies with the weakest differentiation: 16%

At the same time, it has apparently been more difficult both to retain and attract customers.

How do you perform compared with your closest competitors in terms of retaining existing customers?

- Index 69% in 2015
- Index 73% in 2014

How do you perform compared with your closest competitors in terms of attracting new customers?

- Index 64% in 2015
- Index 67% in 2014

The underlying trend is that customer experiences appear to have taken a position as an even more vital competitive parameter than previously, provided the strategic ambition is growth.

If work involving customer experiences is not taken seriously now, looking ahead, the companies will have great trouble creating market share and growth.
A totally new trend compared with previous years is that the companies’ ability to deliver customer-driven innovation has become the most significant driver for creating excellent customer experiences.

This development reflects that more companies are achieving the goal of “fixing the basics” and are ready to take the next vital step if they seriously want to differentiate their companies by creating positive customer experiences. Not surprisingly, simply drawing up customer journey maps is not enough. The customer journeys must be enriched with relevant customer insight so that concrete improvements can be incorporated where it is most valuable for the customers, leaving them feeling good at all relevant touch points.

This year’s CEMindex also gives some specific indications concerning what drives the companies’ ability to create customer-driven innovation.

The companies that succeed in realising customer-driven innovation have:

- defined the customers’ journey with the company – outside and in
- designed relevant processes around the customer experiences
- based their initiatives on genuine insight into customers.

The potential in strengthening customer experiences based on customer-driven innovation remains extensive as only 37% of the companies respond positively concerning the ability to deliver customer-driven innovation.
DIFFERENTIATION REQUIRES CONSTANT ATTENTION

The companies’ ability to differentiate themselves is a core part of the benefit of working with improving customer experiences. In that area, the picture is repeated with the high-performing and low-performing companies.

The difference between the top 20% and bottom 20% of the companies has increased in terms of the ability to deliver better customer experiences than competitors.

It is relevant for the Executive Management to reflect on how often differentiation is on the agenda, and how well they are equipped for specific dialogue on how to approach the issues of differentiation and commercial potential in the future. If you aspire to join the ranks of the elite, your focus on differentiation must never waver.

“Why do you always get the feeling in a restaurant that if you leave now, you can be home by a certain time? That happens a lot here in Denmark. Management and consistency are often lacking at vital touch points such as welcoming and saying goodbye.”

Vice President, Brand & Communications,
Dorthe Weinkouff Barsøe, Tivoli
For decades, Coloplast has built up a leading global business based on developing innovative, user-centric products that make life easier for people tackling intimate conditions such as ostomy or incontinence. Since the outset, the B2B company has focused on nurses, as they advise users. However, now most people search for information online before reaching a hospital - if they do - and receive professional counselling. And as soon as the user steps out of the hospital, good advice is expensive. Coloplast has noticed and filled this vacuum by developing Coloplast Care - a user programme for creating life-long customer relations by guiding and helping users to enjoy better life quality. Since joining Coloplast, Thomas Bruhn, Vice President for Consumer Excellence has been responsible for this transformation, which will move the organisation from simply excelling in customer-focused product development to customer-focused service.
Can you explain why Coloplast has changed its focus?

“We were previously very focused on nurses and healthcare professionals when communicating and at touch points. It became apparent that nurses in many countries don’t have time. Typically, people receive help for a short period and are then sent home. So what do they do? Every year over 100 million online searches are made in our niche sector. That shows two things: 1) There is great demand in the market for information and guidance. 2) Attitudes have changed and people now consult the net before visiting the doctor.”

“As we are dealing with chronic conditions, people have a whole lifecycle with our products. This doesn’t harmonise too well with our mission to make life easier for people with these needs because although we have the best products, we don’t provide people with help for most of the time they use and live with those products. Part of our journey has therefore involved saying: How do we get closer to our users?”

So, how do you get closer to your users?

“Our product isn’t like a pill. It’s not a question of understanding a formula. Does the bag fit snugly, give me the life I want and is it discreet? Can I take the catheter with me when I go out? With the Care programme, we now have a dialogue tool that means we can interact far better with users online. Some users have changed their mindsets. You move from being a patient to being a user to being a consumer. That’s why my 30-strong team is called Consumer Excellence, and we have global responsibility for the dialogue with our users. In every country we have a Consumer team talking with consumers every day. Many people really want to know more, and we can help them with that.”

What does your investment in the Care programme mean for Coloplast’s traditional focus on hospitals, institutions and distributors?

“We have a classic healthcare model with sales personnel who drive out to hospitals. We still do that but now we also talk to the users. This puts an entirely different emphasis on our organisation because we are moving from talking to one to talking to 100. This requires major changes because we are moving from being a B2B company to being a B2B and B2C company. Our model has many touch points since we talk to our customers on the phone, and we are accessible on many more platforms than before. We now engage in omni-channel dialogue via the telephone, email, websites, brochures, apps, events, letters and still even fax in many countries.”
“This means that we are moving from having one very clear target group – nurses – our dialogue partners for 50 years, to now also talking with our users. On a lot of platforms. More people, more target groups and different requirements. Those are major changes.”

What challenges can you point out in this transition phase?

“Suddenly, expanding the dialogue with our users is an enormous drain on resources. It produces a completely different dynamism and way of interacting. We must build entirely new competencies in the organisation and adopt a new mindset. People and infrastructure have been our greatest challenge so far. Our users are ready to talk to us, but as a global organisation, we must adopt a new approach. It’s an exciting change management project under the positive headline that we want something new and something more. However, that does not change the fact that it involves changing a global organisation.”

How far have you come?

“We have come a very long way by picking up the pace considerably and by interacting with so many people every day. Three years ago we had one million web hits. Today, we have 8-digit figures. And you can say that our customer interactions are now viewed as generating revenue rather than costing money. We still have plenty to learn about customer behaviour and connecting the dots all the way through their lifecycles. We have a range of data points but we need to understand them in an entirely new way. In our industry, we are first movers in this area and that means we have a lot to learn. We are constantly testing.”

300,000+ have joined Coloplast Care in 24 countries
What have you learned from the initial years with Coloplast Care?

"From our perspective, it makes good sense and the development clearly show that the users are behind us. We can pump up the volume because the need is there."

This year’s CEMindex shows that user-driven innovation is now the most important dimension in efforts to differentiate companies and create results. Coloplast already has a snug position on Forbe’s list of the world’s most innovative companies, but does direct dialogue with customers mean involving them more when developing new products?

"Certainly. We have a very high degree of involvement with a global user panel. We also conduct interviews and always have done. Coloplast is very interesting in a CEM context because our DNA dictates that we must be in direct contact with our users. We have been very customer-focused in product development and are entitled to say that we have the world’s best product portfolio within our sector. Responsibility for product innovation at Coloplast lies for instance with marketing because it must be driven by a market mindset.

"The defining moment for me has been to say that’s all very well but if the people who need our products do not hear about them, then we must also understand these potential users and talk to them. In terms of CEM, the chain has actually been broken. Good products but where is the service? And that makes our work interesting because we must build up supply in the market so that people not only get the best products but also the best service."

What do you think should differentiate Coloplast’s approach to customers in the years ahead?

"What’s special is that we are offering help and support for users after they leave the hospital. We are providing this through Care and by generally supporting a lifestyle in which our products give users the life they want. We must differentiate ourselves on the fact that we have better information accessible, better advice and, of course, better products."

What will be Coloplast’s next move?

"Multichannel dialogue. Right now, the platforms are clearly divided into silos. The touch points should be linked together so that we understand what people want and how we can interact with them better."

COLOPLAST IN BRIEF

The world’s leading producer of nursing products related to ostomy, urology, incontinence, wounds and skincare. The company had a turnover of DKK 12.4 billion in 2013/14, has over 9,000 employees and is represented in 42 countries.
CUSTOMER FOCUS TOPS THE AGENDA

Two out of three companies view customer focus as the most important core element of successfully accommodating the opportunities and challenges the companies are facing. For about one-third of the companies, innovation and development of new business models as well as continuously improving efficiency are among the three most important elements.

Almost 30% of the companies still mention reducing costs as one of the three most important priorities, closely followed by developing employee competencies.

The three most important strategic priorities for accommodating the companies’ challenges are:

- Customer focus: 59%
- Innovation/developing new business models: 36%
- Innovation/developing new business models: 36%

SHORT-TERM FOCUS ON THE TOP LINE AND OPERATIONS

The majority of companies still focus clearly on the top line through planned development activities within attracting customers, retention, additional sales and cross-sales.

However, also more long-term development activities such as developing customer-oriented processes, launching new services and products, digital self-service, a focus on profitability with individual customers and optimising customer-centric channels are being prioritised. When asked where they have planned specific development activities, two-thirds of the companies still appear to be thinking along very short-term operational lines about top line growth, while just one-third prioritise more long-term and strategic development areas such as digital self-service and optimising customer-centric channels.

In what areas are development activities planned in 2015?

- Attracting new customers: 68%
- Retaining existing customers: 68%
- Additional sales and/or cross-sales to existing customers: 57%
- Customer-oriented processes: 45%
- Launching new services and products: 43%
- Developing profitability with individual customers: 35%
- Digital self-service: 35%
- Optimising customer-centric channels: 32%
- Strengthening insight into customer experiences across touch points: 26%
AT THE BEST COMPANIES, TOP MANAGEMENT TAKES RESPONSIBILITY

Whereas during previous years, a significant increase has been evident in the top management’s ability to take ownership for the companies’ customer focus, this year’s figures show that the continuing increase is evident only among the top-performing 20% of the companies i.e. those delivering the best financial results.

At the same time, the lowest performing 20% of the companies have become weaker at anchoring responsibility for the customer experience among the top executives.

The companies score high on the top management communicating the importance of being customer-oriented and creating good customer experiences, however when it comes to explaining how they want to strengthen customer experiences, it is a different story.

Deeper customer insight gives companies a strong strategic basis for making decisions regarding making themselves attractive to customers in the future and thereby ensuring loyalty and growth.”

Market Manager Peter Jensen, Ramboll Management Consulting
PERSONAL STORYTELLING TO PROTECT TIVOLI’S BRAND EXPERIENCE

Denmark’s leading tourist attraction, which is steeped in tradition and culture, wants to charm visitors with a personality and authenticity that differentiates its brand experience from international players. Tivoli is therefore investing considerable resources in recruitment and employee development, as the staff must tell good stories to spread the word and make sure the experience is anything but a rollercoaster ride.

By Jesper Toft Madsen

Its position as Denmark’s most popular crowd-puller, which attracted almost 4.5 million visitors last year, entails visitor expectations that are higher than the Golden Tower itself. As a genuine experience company, it goes without saying that the requirements for delivering constant quality and service are equally high behind the Pantomime Theatre curtain.

Tivoli has a proud and long history as the oldest amusement park in the world except for Dyrehavsbakken ten kilometres to the north. This means there are many different attitudes to innovation. Towering expectations and a balancing act between tradition and renewal are elements of everyday life for the people behind a company that is currently aiming to be a leading brand experience on the international stage.

“We are not like Disneyland. They can often guess that a family with children will be coming through the gate and so it’s easier for them to create a template experience. We are neither American nor academic in our approach to creating experiences. Measuring points are a good thing, but I’d venture to say that we can’t map the customer’s journey through Tivoli because our guests are so different. There is a big difference between a Chinese tourist and the lady who brings her flask of coffee every day. That’s our charm,” says Dorthe Weinkouff Barsøe, Vice President, Brand & Communications at Tivoli.

“For us it’s about common sense instead of working to a script. The employees can judge best about the person standing in front of them, and it’s their personalities that will differentiate us. Our mission is to charm our visitors and that is the basis for everything we do. It’s a matter of taking contact with our visitors to the next level and giving a little of ourselves so that our guests don’t just say ‘OK’ but ‘WOW’.”

COMPLEX YEAR-ROUND BUSINESS

In 2014, Tivoli Gardens was open for 240 days – a personal record. That was far from just a coincidence as Tivoli is consciously moving towards becoming a year-round business that depends less on the season and the weather.

The strategic investment is reflected in the business, which now stands on four cornerstones: The Garden, the restaurants,
the rides and the culture, which covers everything from Friday Rock concerts to the Tivoli Youth Guard, the Pantomime Theatre and the Symphony Orchestra.

Despite the unique urban location, the Garden, with its peacocks and pathways flanked by beautiful flower beds, is the primary reason for visiting Tivoli. It is less surprising that the admission, multi-ride tickets and annual season tickets are what drive turnover. Together, the expanded palette of experiences covers a complex service portfolio that is a logical step towards year-round status but produces a challenging complexity in guest and employee composition.

FOCUS MOVING FROM MANAGEMENT TO EMPLOYEES

Tivoli’s customer focus gained a new dimension in 2013 when CEM was first introduced as a core element of the service strategy. In this year’s CEMindex, top management anchoring is once again among the top parameters that drive differentiation and market results most. Initially, Tivoli also focused on upgrading qualifications and held a 2-day intense masterclass with the management. Now the focus is on raising engagement levels among the many types of employees.

“Our staff includes everyone from nurses, engineers, international ballet stars, ticket sellers and teenagers selling hotdogs. That makes management a difficult but important task. In order to motivate the employees to accept ownership of our CEM initiative, we are translating the complicated Net Promoter Scores into versions that are easier to grasp. Examples are extremely useful and good service stories work,” says Dorthe Weinkouff Barsøe.

MORE THAN A SERVICE

Every week, the employees share anecdotes and they attend service courses and the Tivoli academy, which will all inspire the staff to provide more than just a service. The latest ambassador score indicates an effect. A total of 95% of the visitors respond that they would certainly or probably recommend to family and friends that they should visit Tivoli.
“People are beginning to talk about 8s and 10s in terms of experiences, so we are on our way towards creating a more operational, common language,” says Ida Dyhr, who, as part of the investment in CEM, has functioned as Customer Experience Manager since 2014.

“Service is just a transaction. The difference is in the relationship. I depend heavily on employees’ knowledge of the visitors and one of the next steps will be to compile experiences and stories more systematically.”

Tivoli works on more than just development and storytelling. During the recruitment phase, service employees go through telephone screenings, auditions and individual interviews to get through the gates. They understand that safeguarding and promoting Tivoli’s special charm is a privilege.

NO FLIPPANT WORKSHOPS

Connoisseurs of life come for the atmosphere in the Gardens and a good meal. Families with children come for the rides and candyfloss. Businessmen come to swipe the company credit card. Even though this diverse customer base makes customer journey mapping difficult, through exit surveys, Tivoli is striving to learn more about each segment and the relevant behaviour.

“We have long days, we have quiet days, and we have rainy days at Tivoli. Being well-prepared and keeping up our spirits and standards is an art. Employee teamwork means a lot, I believe, since sometimes the hours are long.”

Dorthe Weinkouff Barsøe, Tivoli

The exit surveys give Tivoli knowledge of the visitor’s satisfaction parameters, planning horizon and preferences, which are all important input for business development. But the link to the bottom line is not sufficiently crystal clear.

“We can’t always say why we have satisfied visitors, and we need to act based on a more valid foundation. We will gain that by looking more closely at the individual touch points within the different types of guests – what creates emotional value for the guests and what creates financial value for Tivoli,” explains Ida Dyhr.

HELLO AND GOODBYE

The more detailed mapping is therefore one of the next tasks for Tivoli, which after the implementation phase has set specific targets for customer satisfaction for the first time this year. In the heaps of mails from guests, two vital areas have emerged: Hello and goodbye.

The first and last impressions represent two essential touch points for Tivoli’s holistic experience. For example, when the ticket controller at the entrance puts his Tivoli cap on a lucky lad’s head and some hours later sees babies snoozing comfortably in their prams and asks the parents if they had a good time.

At Tivoli, the employees’ personalities shine through. Personal storytelling remains part of the charm – and that should give visitors a happy gut feeling that reaches far beyond the butterflies you get from the rollercoaster, whether it’s going forwards or backwards.
INTENSE COMPETITION MAKES DIFFERENTIATION DIFFICULT

This year, we have added a new dimension to the CEM model – the customer experience – containing six questions. This dimension summarises the total customer experience and explores the extent to which customers have a consistently good experience across all touch points, the rational and emotional focus as well as whether the customer experience is excellent.

Questions have also been added to the Loyalty Index to reveal a company’s attractiveness in relation to competitors and customer’s general satisfaction.

Altogether, 58% of the companies think their company is as attractive as the alternatives. This corresponds well with the fact that as many as 69% do not think it is difficult for competitors to copy their company. The competition is therefore perceived as very significant, though the figures correspond well with our experience from similar market surveys.
One important challenge in differentiating a company on the basis of good customer experiences is to deliver a highly consistent customer experience. It is not sufficient to deliver good experiences at individual touch points if the customer experience is eroded at other points. An important driver for delivering consistently good customer experiences is the customer culture at the companies and the common understanding of how the customers should experience being customers. In this year’s CEMindex, only 43% of the companies state that they have a common understanding of how the customers should experience being customers.

Another important driver for delivering consistently good customer experiences is the employees’ motivation. This also appears to be challenged in this year’s CEMindex, where only 47% of the leaders agree that employees are motivated to deliver good customer experiences.

The fact that the customer culture is challenged in these two dimensions indicates that the management competencies for driving the customer culture in many organisations have proved inadequate.

For me, it's about an authentic relationship. When I'm in a shop buying a skin cream, I expect the shop assistant to give me advice and personal service. When I've been out to eat, I remember the waiter’s personality as much as the food. It makes a difference.”

*Customer Experience Manager Ida Dyhr, Tivoli*
THE EXPERIENCE THAT IMPACTS THE BOTTOM LINE

The top management’s engagement in customer focus is a vital factor in realising commercial potential, according to CEMindex 2015. However, for many senior management teams, customer surveys are exclusively a matter of prestige and the highest figures. To ensure ownership and understanding, Ole Sorang, Nordic Marketing Director, at Carlson Rezidor Hotel Group has started to develop an NPS Simulator that documents the financial value of the customer experience.

By Jesper Toft Madsen

High figures and satisfaction scores. When business executives are competing for customer satisfaction, loyalty and the ambassador effects, having the highest score is prestigious. That is neither surprising nor sinister, but very few companies manage to make the results relevant to the business.

“Customer culture and top management anchoring” are number two on the list of the six CEMindex 2015 dimensions with the greatest impact on differentiation and financial results. In recent years, corporate executives have become more engaged in the customer experience, however this year’s results reveal a growing gap: The top 20% of the companies that delivered the best financial results in 2014 are continuing to strengthen top management anchoring whereas the bottom 20% are getting consistently worse at placing responsibility for customers with senior management teams.

DEEPER UNDERSTANDING

At one of the largest and most rapidly growing hotel chains, Ole Sorang, Nordic Marketing Director, at Carlson Rezidor Hotel Group has teamed up with Ramboll Management Consulting and taken the first step towards creating ownership and a deeper understanding of customer surveys. Using a simulation tool, the NPS Simulator, the hotel group can begin to predict the financial effect of delivering better customer experiences.

“I often experienced that when the organisation considered the NPS result it was solely to benchmark the figures themselves. There was a lack of understanding and insight into underlying factors. With the NPS Simulator, we can link the surveys directly to the financial results and that can make the management appreciate that there is much greater commercial potential in NPS than a ‘mine is better than yours’ approach,” says Ole Sorang.

NPS ILLUSTRATES BOTH THE BENEFITS AND COSTS

Last autumn, work began on developing an NPS Simulator model that can simulate the monetary value of NPS and the hotel group’s loyalty programme, Club Carlson. Based on parameters such as the number of guests, average consumption, customer lifetime and ambassador effect, Carlson Rezidor wanted to be able to calculate the exact value of the positive and negative effects of guest experiences. In addition to the classic customer segmentation of promoters, passives and detractors, the simulation project also encompasses all the touch points – from making a reservation to checking out, from a luxury hotel in Kuwait to a 3-star hotel in Copenhagen.

“Based on what we know about these parameters, we can e.g. extract the figures from one hotel for all of 2014 and compare them with the total financial gain or cost of specific NPS results for members and non-members, respectively. We can see the specific effect of increases and decreases in NPS and even more importantly – the value of converting non-members into members. In this way, we can begin documenting the effect of enticing more customers to join the loyalty programme, and that can facilitate investing in the customer experience,” says Ole Sorang.

Ole Sorang, Nordic Marketing Director, represents more than 60 hotels in the Nordic Region and over 1,300 hotels in 82 countries worldwide.
The CEM dimension that has progressed most since last year in relation to impacting on differentiation and market performance is recruitment and development of employees. In 2014, this dimension was in sixth place but in 2015, had jumped to second place, beaten only by customer-driven innovation, and is now level with the customer culture and top management anchoring.

During the crisis years, most companies cut back on employee development and training. The explanation could be that now there is more financial optimism and thereby more scope for employee training. The companies have also begun recruiting new employees after many years without growth.

The survey shows that the employees are lacking a specific answer to how they should be more customer-oriented. What is my role in production or sales when it comes to giving customers a good customer experience, and what should I do, specifically, to make a difference?

First and foremost, it is important to define which rational and emotional experiences the customers should have at the respective touch points. Then there is a considerable need to train the employees to contribute towards making this happen.

- **51% agree** When employing and training employees who have contact with customers, we definitely highlight people skills.

- **47% agree** We ensure that employees have great understanding of our customers’ wishes and needs.
DEEP CUSTOMER INSIGHT CREATES PLATFORM FOR METRO GROWTH

Travellers have become more loyal to the Copenhagen Metro, which has been experiencing powerful passenger growth since 2010. This progress can largely be explained by a commercial strategy based on an extensive study of transport and travel habits in Copenhagen.

By Jesper Toft Madsen

They are used to a lot of digging. But in the last few years, Metroselskabet - the company behind the Copenhagen subway system - has not just been using the big shovel when establishing new stations. By digging deeper into passenger habits and experiences in a comprehensive survey, the company has gained valuable insight into customer behaviour and which initiatives were necessary to make the Metro even more attractive and create a foundation for growth.

In just five years, the Metro has experienced a massive influx of passengers - from 50 million in 2009 to 56 million in 2014.
The growing passenger base is not the only success criterion, however. The percentage of satisfied or very satisfied customers is at 94%. During the period 2010-14, the number of travellers who would recommend the Metro to others grew from 44% to 52% while the Net Promoter Score rose by 9 percentage points from 21 to 30.

In other words, customers have become more loyal.

“I’m pleased that all the preparations and the many initiatives towards passenger growth and loyalty seem to have paid off. While we’re moving in the right direction, we are also fully aware that we need to work hard if we want to maintain and improve the metro’s attractiveness,” says Maj Trige Andersen, Commercial Development Manager with responsibility for product development and new services at Metroselskabet.

**AMBITIOUS GOALS**

This cautious statement can be explained partly by a high level of ambition. For three years in a row, from 2008 to 2010, Copenhagen Metro was named the best in the world. Even so, in 2010, an even more ambitious goal was set: When we reach 2015, 15% more passengers should be travelling by Metro.

Such an ambition is not achieved through hunches alone. Metroselskabet therefore called in Ramboll Management Consulting and compiled a customer survey to help identify current and potential Metro users.

“We set the bar high when we decided to pursue a 15% increase in passengers. To make sure the goal was realistic, we needed to know more about the customers’ intentions, including their reasons not to use the metro as this would enable us to make it more attractive and also get input for future positioning,” says Maj Trige Andersen.

**WHY PEOPLE TAKE THE METRO**

Through user questionnaires and focus groups on needs, attitudes and behaviour, the customer survey indicated reliable operation, travel time and direct connections as the three most essential criteria for whether passengers choose to travel by Metro. And even though customers rank the Metro high on all three criteria, the results provided food for thought.

“People have become used to not needing to plan a Metro journey. They display great trust and patience when we e.g. build new platforms to increase operational stability. However, the survey also showed that the users think the Metro is expensive. The price experienced is actually higher than the real price, and that has given us a communication challenge,” explains Maj Trige Andersen.
FROM INSIGHT TO ACTION

In order to translate the new knowledge into concrete actions, the survey clarified which initiatives could break down barriers to gain the most potential effect on travel activity.

Among them were cheaper tickets, more visible Metro stations and better connections between cars, cycles and the Metro.

The survey also indicated that potential lies in establishing strategic partnerships and developing an expanded range of services for tourists and people travelling in their spare time.

“For example, we have joined forces with Den Blå Planet and Wonderful Copenhagen thanks to the customer survey, which gave us an action-oriented basis for making decisions,” says Maj Trige Andersen.

CLEARER PASSENGER INFO ATTRACTS TRAVELLERS

Naturally, users’ overall experience affects attitudes to the Metro. However, how can you ensure that the initiatives have a positive effect on attitudes? The survey estimates that clearer passenger information before and during the journey can result in significantly more travellers every year.

For example, it revealed that improved knowledge of the stations was required, and Metro has therefore erected markers at some stations. To strengthen the journey experience itself, in cooperation with Movia and DSB, signs have been improved at node stations and shared service information introduced for buses, S-trains and the Metro.

METRO AT EYE LEVEL

The Metro app shows upcoming departures and updates on any service disruptions, while a fourth initiative focuses on the Metro culture itself:

“Most people in Denmark recognise the saying ‘First out then in’, and the footprints painted on the platform that indicate where the doors will open and where passengers should stand to improve the flow. Of course, it means a lot for the experience that fellow passengers engage in the right Metro behaviour. We have therefore tried to influence that by what behavioural psychologists call nudging. We try to nudge people’s behaviour with a smile – and by giving them a choice,” says Maj Trige Andersen.

A vital next step will be a new customer survey to clarify passengers’ overall customer journeys through the Metro.
AUTOBUTLER WHEELS BIG DATA INTO THE RACE AGAINST THE GIANTS

The digital entrepreneur Autobutler is a well-oiled growth story that quickly revealed how a simple concept of transparent workshop invoices could shake the foundations of a large well-established industry. Co-founder and partner Peter Michael Oxholm Zigler explains about the concept, resistance and how data-driven customer insight will be used to fine-tune the wildcard in the race against the industry giants.

Interview by Jesper Toft Madsen

> The concept is simple but theoretical.
I wrote my thesis at Copenhagen Business School about how the internet has created a new market reality with a fragmented media picture, changed user behaviour and new business models. The thesis made it clear to me that the balance of power is shifting from companies to consumers. The Autobutler concept arose as a rational question: In which industries has the consumer not gained power yet, and where is that likely to happen? Buying and selling cars went online 15 years ago. But the aftermarket, operation and maintenance, was not online when we started in 2010 – and it still isn’t today. My partner, Christian Legêne, and I thought: ‘We can accomplish something here.'
Let’s take on the automotive industry’. Users want transparency and fair prices. Basically, we have simply given them the appropriate tool.

> Our primary customers are car owners. If we didn’t focus on them, and there was no underlying need, we wouldn’t be able to sell the concept into the auto workshops, and our business model therefore also involves them paying to get customers via us.

> We work with two customer concepts: supply and demand. Our basic theory is that car owners drive the market. That has made getting started very difficult because people must change their behaviour. First we need car owners to stop driving down to their local mechanic, and then we must also convince the workshops to get customers online.

> TripAdvisor, Trustpilot, Just-Eat, Netflix, Spotify, Uber. The common denominator for all these successful ‘disruption cases’ is that the users hold the power. Almost all of them are linked to ratings and it can’t get more customer-centric than that.

> We have 6,000 user reviews of our services on Trustpilot, where we have a score of 9.2 out of 10, and another 35,000 reviews of our affiliated workshops. That’s a brand new customer experience you’ve never encountered before: ‘Wow, I know what I’m paying for and how many percent I have saved. I’m not being cheated anymore, and I determine the price of my workshop bill’. The ‘aha!’ experience is the reason we have such a good grasp of the market and it has gone viral. As a general rule, a good customer experience is revolutionary. And this is what is generating growth.

> Despite the fact that we’ve been going for five years, we have an estimated recognition score of only 15% in Denmark, and we have only 2% of the market. The potential is still enormous. Sooner or later many people will have had the ‘aha!’ experience but how should we ensure that they will come back for more when the experience has lost its novelty? That is a strategic challenge we are still struggling with. Many people use Autobutler once, and they find a good workshop they feel deserves their loyalty.

> It takes considerable legwork to start up but when you’ve got demand and supply to balance and are growing at the same time, it will become attractive to build marketplaces. The curve will change direction, the dynamics will take hold and then the workshops will come to us.

> Most workshops know we are there winning market share every day. They see us as a hot potato that they must address.

> We have met closed doors from day one because the industry is extremely conservative and, to be honest, very unwilling to change. No one should try to tell the workshops what is happening in real life out there. My point is that every time we have met resistance it has fuelled our resolve because it confirms there is a need. In all four countries, we have experienced how the workshops think they can live as they have for decades. We know that the new reality is gaining ground and we’re bound to win market share.

> When starting up – in new markets – we haven’t needed to know very much about the consumers except their basic needs. Conversely, we have been operating in

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**THE STORY IN BRIEF**

In 2010, Autobutler was launched with the mission of creating transparency and more price competition in the car industry. As an independent online workshop portal, Autobutler collects offers for car owners’ repairs or a service from the nearest mechanics. Car owners can then compare them and choose the offer they prefer.

Autobutler now has about 70 employees, operates in four countries and was named Danish start-up of the year in 2014.
Denmark for five years and our marketing efforts have become much more sophisticated. We involve users as often as we can, devising customer journeys, personas and segments to work out which messages suit Mr Smith with a Mazda 626 vs. Jane, who’s 42, with a Fiat Panda. We are building up the machinery to keep pace with market developments.

> **Our marketing** automation system includes CEM initiatives, and we have studied touch points – but there are two phases. The first is to get the basics in place by learning as much as possible about first-time users and how we can ensure that our experience creates loyalty. In the second phase, we must map the precise customer journey to add a long term perspective and learn how to address the customer over time.

> **It is actually** paradoxical that every time a new player enters the stage, we applaud the competition because we are in the process of changing the customer behaviour of both car owners and workshop bills have never really been in synch.

> **What we learn** about customers doesn’t mean very much for our differentiation now, but at some point it will. Right now, we are laying the ground work. We are differentiating ourselves on the concept...
alone. You can either go to your local workshop and be cheated or you can go online and save both time and money.

> **Autobutler is green** when it comes to converting data. The focus in our short lifetime has been on attraction – we want customers – and the quicker the better. Retention and loyalty have not been on the agenda until now. We have over 175,000 customers in Denmark and we are now beginning to look at what the data tells us about our customers. We are objective by nature and are pleased to make data available, which no one else in the industry has been willing to do to date. We have had 600-700,000 offers through the system, which can be used for market surveys. What should repairing a Skoda Fabia cost compared with a Fiat 500? No one else has collected this insight over time and been interested in disseminating it.

> **Our data cruncher** is spoilt for choice. We have so much data that he could go in 1,000 different directions. The trick is to limit yourself to the essential aspects and find links. Converting data into intelligent decisions is difficult.

> **Very few people know** that our success is based on a digital platform linked to all the workshops. To give car owners a good experience, we have built advanced software that improves the efficiency of the workshops’ administration and ensures supply. The CRM system means that they get customers coming in, and by automatically integrating with spare parts catalogues and the calendar, they can submit an offer within two minutes. The foremen are rarely experts in dealing with customers or marketing so we make life easier for them.

> **If I had my way,** we would earn money from data. It will probably be on the CRM system targeting the workshops, to give them the chance to develop customer relations that they are lacking today. The underlying digital solution is very unique. I don’t know the time horizon yet but there is no doubt that we are moving in that direction.”

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**QUOTES ABOUT CEM**

The top management has a vital role in proposing some concrete messages about how the company creates good customer experiences. A role that assumes a deep knowledge of your own business.

*Market Manager Peter Jensen, Ramboll Management Consulting*

We have so much data that we could go in 1,000 different directions. The trick is to limit yourself to the essential aspects and find links. Converting data into intelligent decisions is difficult.

*Co-founder and partner Peter Michael Oxholm Zigler, Autobutler*

With the NPS Simulator, we can link the surveys directly to the financial results and that can make the management appreciate that there is great commercial potential in NPS.

*Director PR & Communication, Nordic, Ole Sorang, Carlson Rezidor Hotel*

We must differentiate ourselves on the fact that we have better information accessible, better advice and, of course, better products.

*Commercial Development Manager Maj Trige Andersen, Metroselskabet*

It’s a matter of taking contact with our visitors to the next level and giving a little of ourselves so that guests don’t just say ‘OK’ but ‘WOW’.

*Vice President, Tivoli Branding & Communications Dorthe Weinkouff Barsøe, Tivoli*

Our strategic ambition is to be the best part of the journey. We have the courage to have pride as a value.

*Commercial Director Peter Krogsgaard, Copenhagen Airports*

We must differentiate ourselves on the fact that we have better information accessible, better advice and, of course, better products.

*Commercial Development Manager Maj Trige Andersen, Metroselskabet*
WE TRY TO NUDGE PEOPLE’S BEHAVIOUR WITH A SMILE - AND BY GIVING THEM A CHOICE

Commercial Development Manager Maj Trige Andersen, Metroselskabet