SUCCESS STORY

# InMoment Takes Customer and Employee Experiences to the Next Level with *Elevate*

## SUMMARY

- **+51% Increase in Net Promoter Score**
- **39% Increase in Response Rate**
- **30% Decrease in Completion Time**
- **96% Technical Support Ticket Resolution**
- **62% Decrease in Detractors**
- **96% *Met or Exceeded Expectations* During Buying Process**
- **82% *Easy to Work with* During Buying Process**
- **Invaluable Customer-Sourced Knowledge Provided to Product Team**

## INTERNATIONAL CUSTOMER EXPERIENCE AWARDS

Best Measurement in Customer Experience
Silver

Best Customer Experience Strategy—B2B
Silver

Best B2B Customer Experience
Bronze

Have you ever wondered what a CX program looks like at an actual customer feedback management business? InMoment is used to spotlighting our client successes—but, this time we're doing something a little bit different. In this success story, we're giving you all the details of InMoment's very own Elevate program. This success story has been designed to give you a bird's eye view of how we take care of our own customers and employees, with the goal of inspiring you to elevate your program, too!

## WHAT IS ELEVATE?

Elevate is InMoment's robust customer and employee experience improvement program that informs every decision we make—from product roadmap to process changes across our organisation. The program spans the customer journey, including awareness, sales, implementation, and account servicing.

Elevate is a sandbox for modern CX and EX—a place where we can pilot our newest technology, create innovative processes, run creative analyses, and think outside the box—to benefit our customers and employees. We use Elevate to build a culture our employees can be proud of and toward which our customers can aspire. Our guiding principles are to **measure, improve,** and **celebrate.**



## Where Did Elevate Come From?

Previously, InMoment ran an annual relationship study and various transactional touchpoints—but we didn't yet have a view of the entire customer journey. We excelled at inner-loop issue resolution, but were missing the leadership, governance, and processes for broad improvements and to make a meaningful organisational change.

We knew it was time to rethink and modernise our CX initiatives. And we knew from experience that we would have the best chance of sustainable success if our experience improvement program had a clear charter, dedicated program owner, and cross-functional support—grounded by a playbook of best practices.

InMoment has hundreds of customer experience professionals on staff with tens of thousands of years of combined experience in customer experience. We help our clients design, collect, understand, transform, and realise their customer feedback to improve experiences, and we wanted to ensure we had an industry-leading program ourselves.

A year ago, we began developing a new program by leveraging expertise from our deep bench of CX professionals. The success of our customers has always been—and always will be—our top priority, and we needed to ensure we'd push ourselves every day to make this happen.

From here, our new improvement program, Elevate, was born!

## WHAT'S THE GOAL OF ELEVATE?

Our business naturally thrives when we bring value to our customers and promote a culture that our employees are proud of.

Our employees spend the lion's share of their time bringing value to our clients by having calls with program owners, developing solutions to meet their needs better, and optimising workflows to reduce friction and make doing business with us a breeze.

### At InMoment, we measure success for our clients—and ourselves—in the following ways:

- **New customer acquisition**
- **Customer retention and growth**
- **Reducing cost to serve / boosting efficiencies**
- **Talent acquisition / retention / growth**

To achieve these goals, we needed to expand Elevate beyond traditional listening posts and incorporate the voice of the market, prospects, and our employees. We defined what success looked like for us and crafted our program to help us get there. We wanted to evolve our efforts to use Elevate data in every decision—across all teams and in every region.

**In addition, we wanted to set an example of what "great" looks like:**

**Technology.** Using our own technology for Elevate gets more staff members into InMoment's XI Platform, making us better product stewards. It improves the understanding and conviction for our marketing, account development, client success, product, human resources, and sales teams—not just because they have access to the data, but because they have their hands in the platform. It makes CX accessible to everyone in our organisation.

**Best Practices.** We wanted to understand potential pain points that our customers experience as they build, maintain, and grow their programs with us. We were prepared to be humbled and motivated by what we learned because every improvement we make ultimately benefits our customers.

## BRINGING ELEVATE TO LIFE

There were a few key elements that were critical when it came to bringing Elevate to life:

**1** **Cross-Functional Team.** To design our program, we brought together a cross-functional team from CX, implementation, technical success, strategic insights, and customer success. We agreed that to understand where to go, we needed to know where we'd been. We needed to deploy top performers to Elevate, so we asked each leadership team member to nominate an employee from their department to participate.

**2** **Ecosystem Mapping.** We began by mapping our primary customer experience ecosystems to identify the people, things, and systems that impact the customer experience throughout the customer journey—and how they're performing. Our ecosystem maps—paired with customer feedback—help us confirm our assumptions and uncover new opportunities for improvement.

We identified the touchpoints where listening posts already existed and reviewed the associated surveys, alerts, reports, and dashboards. And where no listening post existed, we built it.

**Over the past 9 months, we've followed a similar cross-functional process to launch:**

- 12 customer listening programs
- 8 employee listening programs (both employee experience and voice of employee)
- Integrated and analysed 4 additional unsolicited and contextual data sources

**3** **Survey Modernisation.** While the structured and unstructured data before Elevate was rich, a respondent could answer up to 35 metric, driver, and open-ended questions in a single survey. This led to a 9-minute average completion time for our relationship program—which was not the survey experience we wanted our customers to have. Plus, we had multiple variations of a core survey.

We quickly realised that many of the driver questions were highly correlated—both to each other and the primary metric (NPS)—meaning we didn't need to ask them! Further, we knew the drivers would come out in the open-ended comments, which we could analyse using text analytics in our XI Platform.

**4** **Clean 15.** By interviewing our internal stakeholders, we learned our sample process was broken. We relied on the accounts teams to not only opt their clients into the correct survey version but also choose when their contacts would receive the survey.

We paired four survey versions into one streamlined survey that would work for all contacts, and knew that if we had the proper metadata, we could segment the responses during analysis. We also removed the need for account teams to choose the timing and split the sample into two groups.

However, this methodology required clean metadata, which meant we needed the account teams to make significant updates in our CRM platform, Salesforce. This was when we came up with the Clean 15: the 15 fields in Salesforce that must be populated and accurate for all key account contacts.

A cross-functional group built the quick and straightforward process: set it and forget it, as we say internally! Our Director of Experience Improvement then took a virtual world tour to every business unit and global team to explain the process and set a timeline for cleaning their data. According to one of our Customer Success Directors:

"The Clean 15 has simplified things for me in a huge way. At an account level, it's one click for me to check the data and confirm that my account is up-to-date—super easy! Then at the contact level, the same thing: one click to confirm I've opted the client in!"

We are so obsessed with accurately segmenting our responses—and thus being able to make informed decisions based on the feedback—that if a contact does not have "clean" data, we will not send an invite until we fix the data in Salesforce. It sounds brutal, but it matters!

**5** **Branding and Communications.** We engaged our graphic design team to build a new and consistent internal and external brand for Elevate across communications, surveys, alerts, and reporting. While crafting the program, we sent company-wide communications outlining our process, progress, and goals. We started a Slack channel (#elevate_updates), and hundreds of employees have opted to follow this channel. We also shared a communications cadence so our teams know when to expect sample files, quarterly summaries, and initiative updates.

## WHAT KIND OF IMPACT HAS ELEVATE HAD AT INMOMENT?

Since its launch, we've continually refined Elevate, leading to an enhanced experience for our customers throughout their lifecycle and positive outcomes for our employees and InMoment. We've improved awareness, our website, virtual events, the sales process, demos, and our product roadmap. We've also improved how we implement, support, and grow client programs—to help our customers hit their goals more easily.

Here is a sample of some of our successes:

### Customer Success Relationships.

Our modernised relationship program has been a considerable success internally and with our customers. Since launching:

- We've seen a 51% increase in NPS

- We've provided our product team with invaluable customer-sourced knowledge, including the top three solution requests for product development by segment

- Our response rate has increased by 39%, exceeding the industry average

- Our completion time has been cut by 30%, creating a better feedback experience for our customers

- Our account teams opted in 1,400 contacts with "clean" metadata, allowing us to segment responses using seven contextual filters

- We have identified multiple customers who have expressed interest in being part of the first wave of our platform migration process (a key business initiative for 2022–3)

### Above & Beyond Recognition.

In the Relationship Program, the "Above & Beyond" question asks customers if an InMoment individual or team has gone above and beyond to ensure their success. Through 75% of feedback:

- 66% of customers responded "yes," with many others calling out individuals in the open-ended comments

- We hit a high of 76% in Q3 2022

- Customers have called out over 500 InMoment employees since the program began

- The program has had a massive boost to our employee morale and retention

- We've recognised hundreds of individuals at company All Hands meetings and Slack channels

- We have highlighted multiple individuals through weekly recognition emails that go to the entire company

## Buyer Interviews.

We have conducted over 100 post-opportunity interviews since launching the program, and by using text analytics with the XI Platform, we have:

- Identified the top three drivers of wins, losses, and exits (respectively)

- Identified the top technology requirements and requests from our customers and prospects, which inform and drive our product roadmap

- Deployed nearly ten touchpoint teams to solve issues such as improving our demos and presentations, simplifying pricing and packaging our solutions, and communicating our product releases to customers and employees

- Since launching a new demo certification process, we've had over 500 employees successfully certify, with another 200 partially through the process

## Post Event Pulse.

Since launching Elevate, we've collected over 500 responses across multiple webinars, roundtables, and live events, resulting in an average OSAT of 4.46. This touchpoint has brought new intelligence to our marketing team to ensure they continue to bring valuable content to our customers and potential customers.

## Technical Support.

We learned that we needed a better way to provide timely and accurate responses to technical requests from our small and midsize businesses clients. The current system created bottlenecks and left our strategic account teams spending time on common requests at the expense of strategic initiatives that could drive our customers' programs forward. The solution was to have SMB customers route all support requests through a dedicated email address where support agents would handle them rather than account teams. The program has been so successful that we've expanded it to other business areas. Now, the technical support team is able to resolve 97% of tickets submitted while the other 3% are sent to Application Specialists or Customer Success Managers (CSM), drastically reducing response time. Our customers are thrilled with how quickly simple requests are solved; for something as straightforward as adding a user, the timeline has shifted from days to hours for a client!

## Platform Feedback.

Since launching this program, XI Platform users have submitted hundreds of pieces of feedback, leading to the deployment of 20+ new features, with another 30 currently being implemented by our engineering team. Additionally, feedback has led to multiple bug fixes, creating a better software experience for our customers. According to our Senior Director, UI/UX:

"Feedback from diverse perspectives within our organization—and customers—is critical to identifying our blind spots and delivering what our customers need and expect from a best-in-class CX platform."
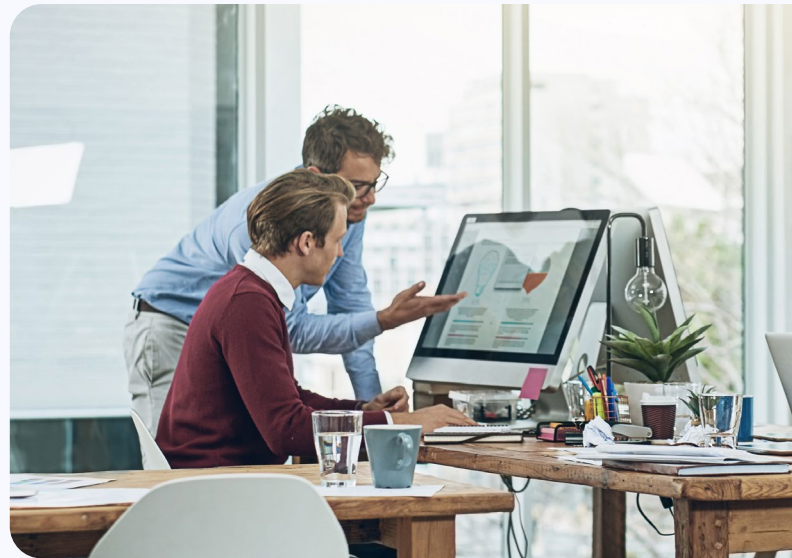
## Your Moments Matter—Employee Engagement.

Across one annual employee engagement survey (83% response rate) and ongoing pulses, we heard that our employees wanted more cross-department connections, a clearer understanding of our company vision and direction, and more coaching and development opportunities.

## WRAPPING UP

Less than a year into our Elevate journey, we can view a customer's experience throughout their lifecycle, from consideration to sales to implementation to servicing to growth, enabling better decision-making and more thoughtful experiences for our customers.

We are taking action to improve processes and communicate our progress continually. We're learning what our employees need to be successful in their roles and to deliver improved experiences for our customers.

Elevate is an example of what a world-class experience improvement program should be. Plus, our B2B customers use several of Elevate's best practices around governance, communications, sample management, and closed loop to make their programs more effective.

## Interested in Elevating Your Program? Get in touch:

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