

# 從心開始，認識忠誠的力量！

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了解並提升「客戶滿意度」一直是企業長期的課題，許多企業都期望能積極完善與顧客的互動過程，增加顧客黏著度，進而提升再購意願及推薦意願。

台灣許多服務業已進行多年的顧客滿意度研究，每年都會針對過去一年曾經有交易或有互動的顧客抽查數千份樣本，進行長達 30 分鐘的電話訪問。然而，這種傳統調查方式逐漸引發企業內部許多質疑的聲音：

1. 經過多年的努力，整體滿意度已經達九成甚至九成五以上，然而，當詢問顧客滿意的原因時，答案卻大多籠統，甚至說不出原因。此外，表示不滿意者也較少能具體描述發生狀況，以致於對行銷策略擬定或後續解決方案設計的幫助皆非常有限。
2. 在現今科技發達的時代，若顧客發生不好的狀況，很快會透過社群軟體或網上討論區等平台，把這些不好的經驗都散播出去，問題早就發酵，甚至已損害企業形象及名聲。
3. 用年度調查的方式，顧客很難記得幾個月甚至半年以前發生的事，單憑模糊的印象作答，這樣的答案是否具備參考價值？
4. 用年度的調查結果來訂定內部員工 KPI 指標達成率，是否有實質效益？
5. 訪問長達 30 分鐘，題目多達近百題，在顧客已回答到相當疲乏的狀況下，答案是否準確？
6. 使用抽查的方式調查數千份問卷，但更多顧客的聲音都聽不到了？
7. 在現今科技發達的時代，是否有更好的調查工具可運用？

從這些質疑的聲音中，我們可以發現傳統的調查方法已無法滿足現況，越來越多顧客沒有時間或意願完成一個冗長的訪問，這種冗長的調查問卷甚至會導致顧客對企業產生負面的影響。另一方面，季度甚至年度的低頻率獲取資料方式，也會阻礙企業做出迅速和正確的判斷。企業正面臨這樣的挑戰，傳統方法無法滿足他們想要立刻了解狀況、立即改善的目標，在這樣的需求下，我們的



解決方案是使用**益普索 EFM (Enterprise Feedback Management) 客戶管理系統**。

EFM 客戶管理系統是一個能夠即時反應並有效累積大數據的系統，與傳統調查最大的不同在於取得顧客回應的時效性及精準度。以金融業為例，顧客至分行辦理開戶，開戶手續都完成後將會很快收到調查邀請，請他針對剛完成的服務體驗進行評分。若是滿意度較低者，益普索及企

業內部相關人員將會第一時間收到警示 ( Hot alert )，緊接著，益普索會以公正第三方的角度，在最快速的時效內主動致電給該顧客，以客觀的立場了解不滿意的原委，讓顧客暢所欲言，並將資料如實轉達企業。最後，再由企業內部採取適當的行動方案，聯繫該名不滿意的顧客，為不佳的服務或引發不滿意的原因致歉並採取補救措施，形成封閉式的回應系統 ( close loop feedback )，不讓顧客不滿意的情緒有機會發酵。

從企業管理的角度而言，透過 EFM 系統，若有警示 ( Hot alert ) 發生，從最高層的 CEO 到第一線面對顧客的管理人員都能收到相同訊息，讓資訊傳遞更有效率並具一致性，避免內部溝通的落差。同時，EFM 系統也是一個階層式的線上回報平台，可依據企業內不同層級的成員制定不同權限，例如區經理，就只能看到該區顧客的資料，更高級的管理階層則能看到更多資訊。

EFM 系統詳實的紀錄受訪者的反應，除了能讓企業更即時與精準的掌握做得不夠好的地方之外，也能從大量的數據中統整顧客的反饋並優化流程，若未來遇到相同狀況時能夠用一致的態度及方法處理問題，讓每位顧客都能體會到最賓至如歸的感受。



關於客戶對於傳統調查方法的質疑，益普索 EFM 客戶管理系統也能夠一一回應及解決：

1. EFM 系統使用顧客及時回饋的方式，才剛剛發生的互動，印象絕對最深刻！
2. 若有警示 ( Hot alert ) 發生，透過 EFM 系統也可及時發現、了解事情原委，同時，主動聯繫顧客，及時滅火，不讓問題留到明天！
3. 在警示發生後的一定時效內，透過第三方客觀且公正的立場蒐集顧客的聲音，顧客不用因為自己的抱怨會被企業內部或自己的服務人員直接聽到而覺得不自在。此外，若顧客表示不需要再後續聯繫了，我們也不會過度打擾。
4. EFM 系統使用普查而非抽查的方式，每位顧客的聲音都能被聽見！
5. 數據使用普查方式累積而成，年度累積下的大數據即為年度指標，用以檢視員工 KPI 達成率極具實質效益。
6. 不超過 5 分鐘的訪問，顧客不會感到負擔。
7. EFM 系統整合多種資料蒐集方式，例如簡訊、IVR ( 互動式語音應答系統 )、社群聆聽 ( social listening ) 等日常生活中就會運用到的工具，不需另外安裝程式或 APP。
8. 每位顧客的問卷連結都是獨立且不重複的，一次互動就是一個問卷連結，不會有重複受訪或資格不符等問題。

EFM 客戶管理系統能夠更有效的蒐集顧客意見，即時解決不滿意之處，並為企業內部制定更適合的 KPI 指標，也能夠激發企業挑戰傳統思維、翻轉遊戲規則，以更有效且貼近顧客的心的調查方式來互動。目前 EFM 客戶管理系統已經廣泛運用在金融業、飯店業、汽車業、零售業等，

協助企業在顧客經驗管理方面向上發展，達立竿見影之效。

### Ipsos Loyalty 益普索忠誠度研究

Ipsos是全球頂尖的專業市場調查研究機構，在挖掘顧客經驗，執行顧客滿意度與忠誠度調查，我們具有創新的思維與先進的科技。在世界各地八十多個國家，有一千一百多個專家，每年產值超過三億兩千五百萬美金。我們是世界頂尖企業執行長最值得信賴的企業諮詢商，有熟悉各產業的專家協助測量、模擬和管理顧客與員工關係。

更多的資訊，請參考[www.ipsos.com/loyalty](http://www.ipsos.com/loyalty)

或洽詢我們的研究團隊

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# Knowing the power of loyalty!

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It has always been an enterprise's long-term objective to understand and enhance "customer satisfaction." Many enterprises hope to actively refine the interactive processes with customers and increase customer stickiness, in order to improve customers' repurchase and recommend intention.

Many enterprises in Taiwan have conducted years of research on customer satisfaction. Every year, thousands of customers with an interaction in the past one year are sampled to conduct an around 30-minute telephone interview. However, this kind of traditional survey method has gradually raised skeptical voices within enterprises.

1. After many years of hard work, the level of overall satisfaction has reached 90% or even above 95%. However, when customers are asked about the reasons for their opinions, their answers are mostly vague and may even be absent. In addition, only a few of the dissatisfied customers are able to specify their situations. As a result, this approach provides very limited assistance to make further marketing strategies or subsequent solutions.
2. If any dissatisfied situations happened, the negative experiences could quickly spread out through social media or online discussion forum with the current advancements in technology. Problems may grow early and even damage the enterprise image and reputation.
3. By conducting annual surveys, it is difficult for customers to remember events that happened months or even half a year ago. Can the answers serve as credible references based on customers' vague impressions?
4. Does the use of results from annual surveys concrete enough in determining internal employees' KPI achievement rates?
5. The interview is as long as 30 minutes with nearly a hundred questions. Are the answers accurate when customers feel exhausted from answering all the questions?
6. Does the method of sampling fail to understand the rest of millions of customer's voice?
7. Are there any better tools to use in the current era of technological advancement?

From these skeptical voices, we realized that the traditional survey method can no longer meet current expectations. More and more customers do not have the time or willingness to complete a long interview.

Moreover, this kind of long questionnaires may even lead customers to have negative impressions about the enterprise. On the other hand, retrieving data at a low frequency every quarter or every year may also prevent enterprises from making quick and accurate decisions. In the face of these challenges, the traditional method cannot satisfy enterprises' objectives to instantly understand situations and make immediate improvements. Under these demands, our solution is to use **Ipsos's Enterprise Feedback Management (EFM) system**.



The EFM system is one that can instantly respond while effectively accumulating big data. It is most different from traditional survey in the timeliness and accuracy in obtaining customer response. Taking the financial industry as an example, customers would receive a survey invitation shortly after they open an account at a branch, which asks them to rate the service they just experienced. In the cases of low levels of satisfaction, Ipsos and related personnel in the enterprise will be notified immediately. Ipsos will then call the customers as soon as possible as a fair third party to understand the details about their dissatisfaction from an objective perspective. Ipsos allows customers to speak their minds and truthfully passes on the information to the enterprise. Finally, the enterprise will adopt the appropriate solutions, contact the dissatisfied customers, apologize for the poor service or the reason that caused the dissatisfaction, and take actions. This closed loop feedback system that prevents customers' dissatisfied emotions from growing into bigger problems.

From the perspective of business management, the occurrence of hot alert through the EFM system should send out the same message to the highest-level CEO and management personnel who face customers on the front line. This allows information transfer to be more efficient and consistent, while avoiding internal communication discrepancies. Meanwhile, the EFM system is also a hierarchical online reporting platform that can be set up with different permissions according to different levels of members within the enterprise. For example, district managers are only able to access customer information within their districts, whereas higher management levels are able to access more information.

The EFM system truthfully records interviewees' detailed feedback. In addition to helping enterprises make improvements on their areas of weakness in a more timely and accurate, it also organizes customer feedbacks from massive data and optimizes the processes. By doing so, a consistent attitude and solutions can be applied to process similar problems in the future, thereby allowing every customer to experience the feeling of home.

The EFM system can also respond and resolve customers' doubts about the traditional survey method:

1. The EFM system adopts the approach of immediate feedbacks as feelings about interactions that just occurred are definitely more vivid!

2. In the occurrence of hot alert, the EFM system can discover and understand the details of a situation timely. At the same time, by actively contacting customers, any dissatisfaction can be dealt with in time without having to wait until tomorrow.
3. Within a specified period after a hot alert, customers' voices are collected through a third party's objective and fair perspective. Customers do not need to feel uncomfortable about their complaints being known by the enterprise's internal staff or their servers. Moreover, we will not disturb customers if they indicate that no further connections are necessary.
4. As opposed to the approach of sampling, the EFM system conducts a census in order to make sure that every customer's voice to be heard.
5. The data are accumulated from censuses, and the big data from years of accumulation are used as annual indicators. They have substantial benefits in examining employees' KPI achievement rates.
6. The interview is less than 5 minutes long. Hence customers will not feel inconvenient.
7. The EFM system integrates many data collection methods, such as texting, interactive voice response (IVR), and social listening. These are tools that can be used in daily life and no additional installation or APPs are required.
8. The survey link to every customer is independent and unique. Hence there will not be any issues with overlapping interviews or disqualification.

The EFM system can not only more effectively collect customer feedbacks and resolve dissatisfaction timely, but it can also devise more suitable KPIs for enterprises. It can stimulate enterprises to challenge conventional ways of thinking, change the rules of the game, and interact with customers with a more effective method. Currently, the EFM system has been widely adopted by the industries of finance, hotel, automobile, retail and so on. It helps enterprises advance in customer experience management with immediate effects.



## Ipsos Loyalty

Ipsos Loyalty is the global leader in customer experience, satisfaction and loyalty research with over 1,000 dedicated professionals located in over 40 countries around the world. Our creative solutions build strong relationships which lead to better results for our clients. This has made us the trusted advisor to the world's leading businesses on all matters relating to measuring, modeling, and managing customer and employee relationships.

For more information, visit us online at: [www.ipsos.com/loyalty](http://www.ipsos.com/loyalty)

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