

Using Analytics to Visualize CX



What We'll Cover

- The Kleingers Group
- Why CX?
- How CX?
- What's missing?
- Doing more with the data.
- Discussion

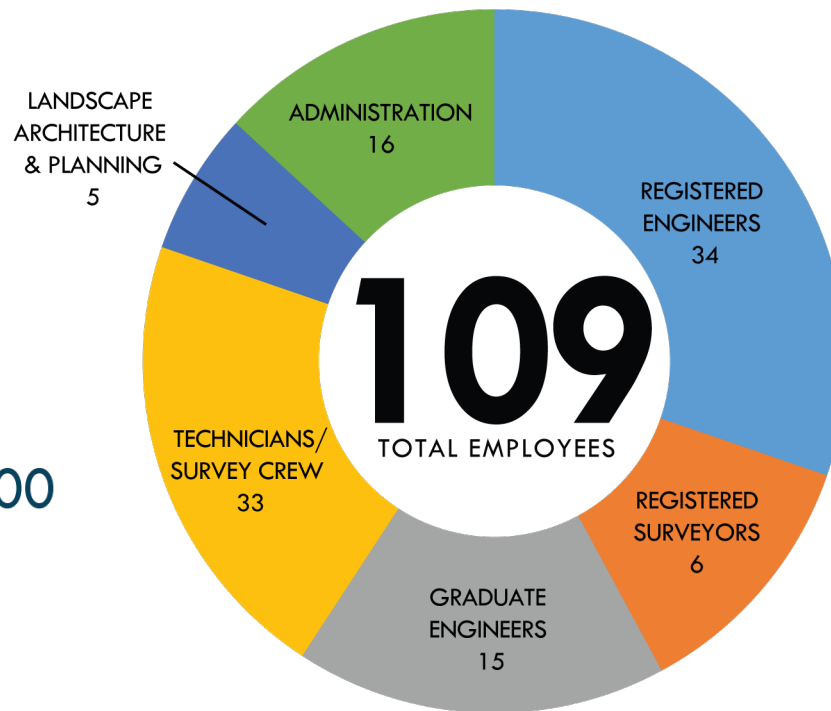
ABOUT THE KLEINGERS GROUP



GROSS BILLING



CURRENT STAFFING



MARKETS SERVED



EDUCATION



OFFICE



RETAIL



HEALTHCARE



INDUSTRIAL



GOVERNMENT



ROADWAY



SURVEY



LANDSCAPE



MIXED-USE



WATER
RESOURCES



SPORTS



KLEINGERS' CORE VALUES

SINCE DAY 1



HONOR OUR
COMMITMENTS

**LISTEN TO
OUR CLIENTS**

DO THE RIGHT THING.

**BUILD LASTING
RELATIONSHIPS**

DELIVER AN OUTSTANDING
CLIENT EXPERIENCE

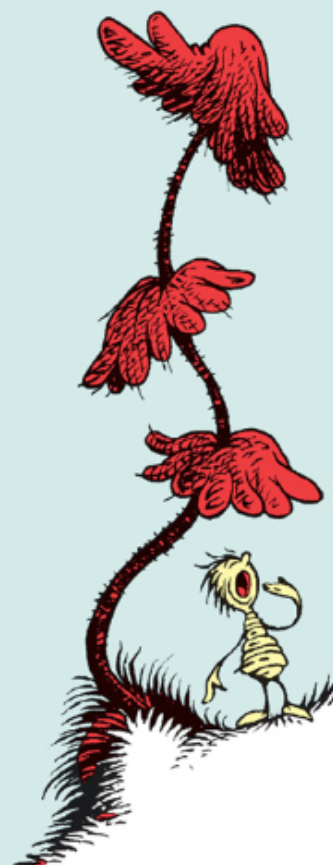
HONOR OUR COMMITMENTS | **LISTEN TO OUR CLIENTS**
DO THE RIGHT THING.
BUILD LASTING RELATIONSHIPS | **DELIVER AN OUTSTANDING CLIENT EXPERIENCE**

**CFT USER
SINCE 2015**



Tribal stories become your culture

CULTURE



The news
Just came in
From the County of Keck
That a very small bug
By the name of Van Vleck
Is yawning so wide
You can look down his neck.

This may not seem
Very important, I know.
But it *is*. So I'm bothering
Telling you so.

This may not seem
very important, I know.
But it *IS*. So I'm bothering
Telling you so.

CHARACTERISTICS



ABSOLUTELY

- EMPOWERMENT
- AUTONOMY
- FLEXIBILITY



NOT AS MUCH

- RULES
- STANDARDS
- CONSISTENCY

10 - 15

SELLER-DOER
MARKET LEADS

20 - 25

PROJECT MANAGERS

1000 ±

ACTIVE PROJECTS

1/2 DAY

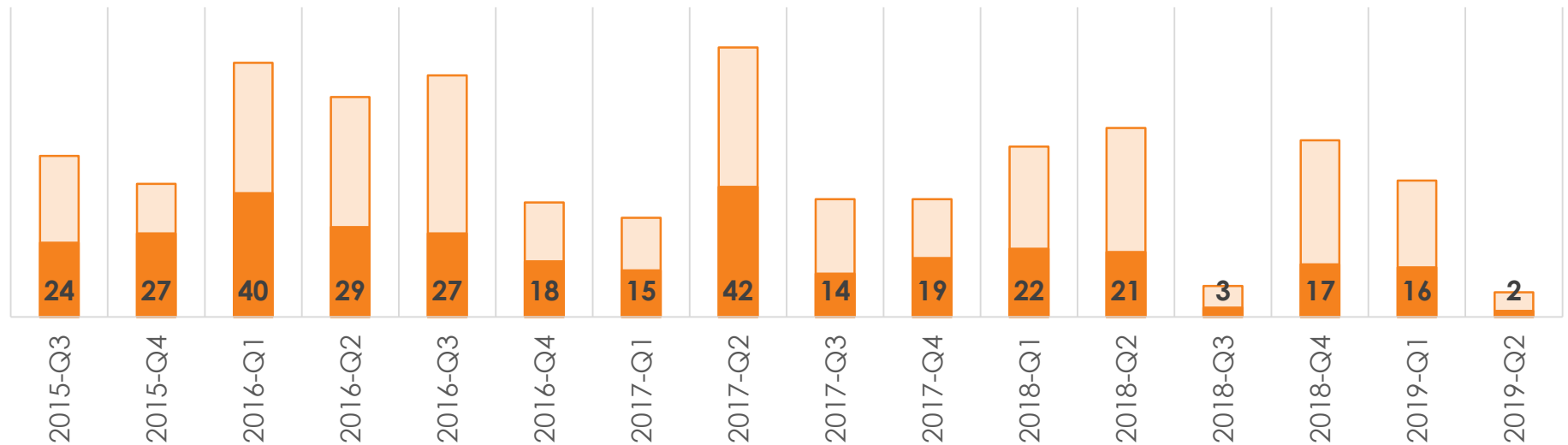
SHORT PROJECTS

3+ YEAR

LONGER PROJECTS

CFT SURVEYS SENT

| | 2015-Q3 | 2015-Q4 | 2016-Q1 | 2016-Q2 | 2016-Q3 | 2016-Q4 | 2017-Q1 | 2017-Q2 | 2017-Q3 | 2017-Q4 | 2018-Q1 | 2018-Q2 | 2018-Q3 | 2018-Q4 | 2019-Q1 | 2019-Q2 | Grand Total |
|---------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-------------|
| Completed | 24 | 27 | 40 | 29 | 27 | 18 | 15 | 42 | 14 | 19 | 22 | 21 | 3 | 17 | 16 | 2 | 336 |
| Not Completed | 28 | 16 | 42 | 42 | 51 | 19 | 17 | 45 | 24 | 19 | 33 | 40 | 7 | 40 | 28 | 6 | 457 |
| Grand Total | 52 | 43 | 82 | 71 | 78 | 37 | 32 | 87 | 38 | 38 | 55 | 61 | 10 | 57 | 44 | 8 | 793 |



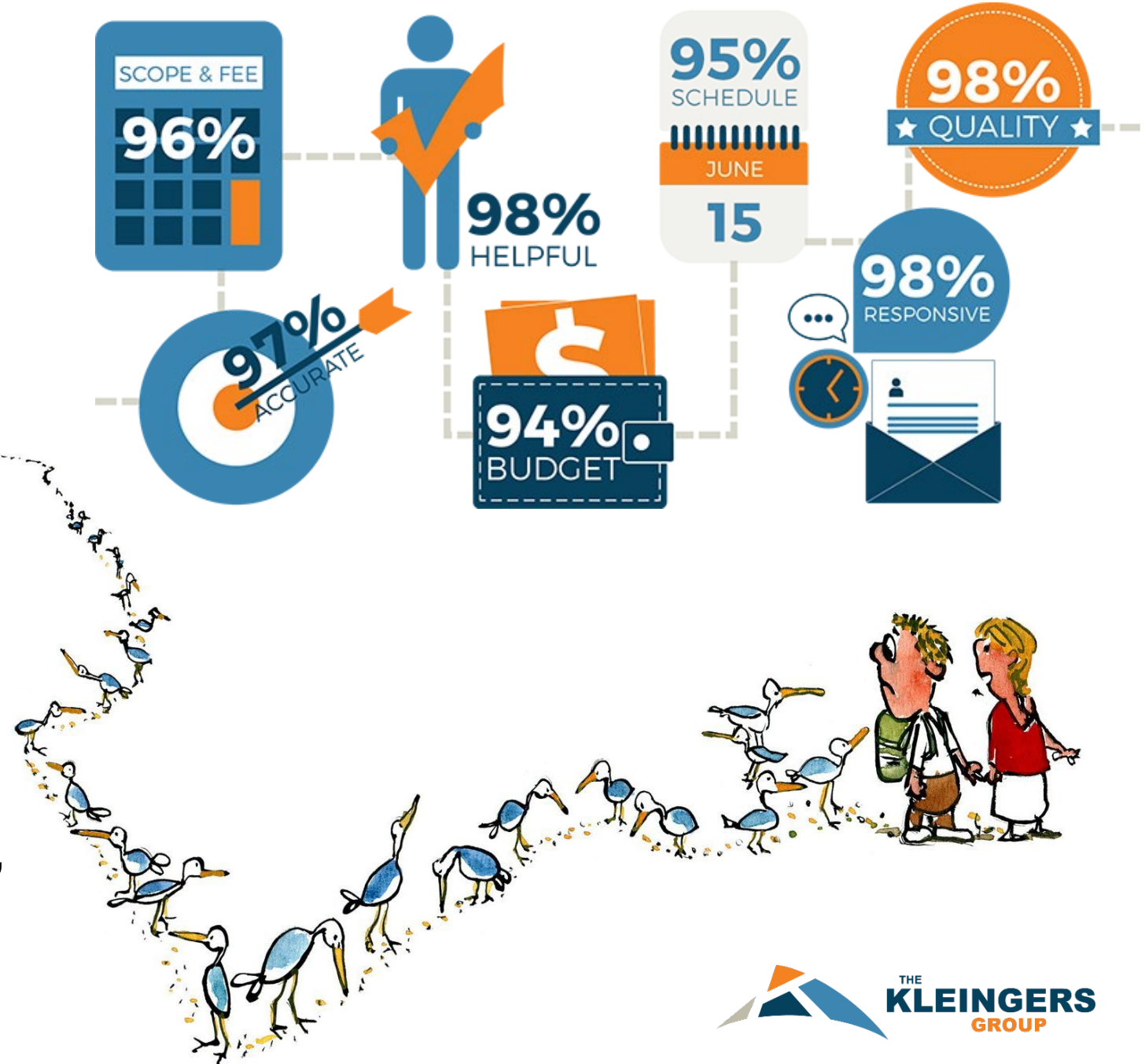
■ Total
 ■ Completed

AVERAGE CFT SCORES



| | 2015-Q3 | 2015-Q4 | 2016-Q1 | 2016-Q2 | 2016-Q3 | 2016-Q4 | 2017-Q1 | 2017-Q2 | 2017-Q3 | 2017-Q4 | 2018-Q1 | 2018-Q2 | 2018-Q3 | 2018-Q4 | 2019-Q1 | 2019-Q2 | Grand Total |
|---------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-------------|
| Surveys Completed (Count) | 24 | 27 | 40 | 29 | 27 | 18 | 15 | 42 | 14 | 19 | 22 | 21 | 3 | 17 | 16 | 2 | 336 |
| Relationships | | | | | | | | | | | | | | | | | |
| Helpfulness | 5.2 | 5.0 | 5.6 | 5.7 | 5.3 | 5.2 | 6.0 | 5.7 | 4.9 | 5.2 | 5.4 | 5.6 | 6.1 | 6.0 | 6.0 | 7.0 | 5.5 |
| Responsiveness | 5.0 | 5.7 | 5.6 | 5.7 | 6.0 | 5.4 | 6.1 | 5.7 | 4.6 | 5.4 | 5.7 | 6.0 | 4.5 | 6.1 | 5.6 | 6.5 | 5.6 |
| Quality | 5.1 | 5.3 | 5.3 | 5.6 | 4.9 | 5.5 | 4.9 | 5.5 | 4.7 | 5.6 | 5.4 | 5.5 | 6.3 | 5.7 | 5.3 | 6.5 | 5.4 |
| Deliverables | | | | | | | | | | | | | | | | | |
| Budget | 3.9 | 4.9 | 4.6 | 5.3 | 4.6 | 4.4 | 4.9 | 4.7 | 4.2 | 4.5 | 4.3 | 5.3 | 5.5 | 5.1 | 4.1 | 6.5 | 4.7 |
| Schedule | 5.1 | 5.2 | 5.4 | 5.6 | 5.2 | 5.3 | 5.8 | 5.6 | 4.8 | 5.0 | 4.9 | 5.5 | 6.3 | 5.8 | 4.3 | 6.5 | 5.3 |
| Accuracy | 5.3 | 5.0 | 5.6 | 5.5 | 4.9 | 5.0 | 4.9 | 5.3 | 5.0 | 5.3 | 5.2 | 5.8 | 6.3 | 5.5 | 3.4 | 6.5 | 5.2 |
| Scope and Fees | 5.0 | 4.3 | 4.2 | 4.6 | 4.8 | 4.6 | 5.2 | 4.1 | 4.1 | 4.8 | 4.6 | 4.7 | 2.0 | 3.6 | 4.7 | 6.4 | 4.5 |
| Grand Total | 5.0 | 5.1 | 5.2 | 5.4 | 5.1 | 5.1 | 5.4 | 5.2 | 4.6 | 5.1 | 5.1 | 5.5 | 5.4 | 5.4 | 4.8 | 6.6 | 5.2 |

WINNING



“Kleingers is the best company ever!”
~ Satisfied Client

“OPPORTUNITIES”

LIMITED USAGE

“HEY, SALLY SUE AT
CLIENTCO JUST TOLD US
SHE’S HAPPY. LET’S SEND
HER A C.F.T. REQUEST.”

ADMIN BURDEN



LEARNINGS – TWO THINGS

MUST MAKE IT:
EASIER “TO DO”
THAN
“TO NOT DO”

AUTOMATION



MUST PROVIDE:
VISIBLE AND
USABLE RESULTS

ANALYTICS

The Tools

- Client Feedback Tool - timely client feedback
- Clearview InFocus ERP - timely project metrics

Existing Analytics

clientfeedbacktool
THE POWER OF FEEDBACK

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Home Ask **Review** Follow Up My Firm Preferences Resources Support

Update Reset File Filters Options

Last 30 Days
Last 90 Days

Dates

'Feedback Quotient'® Reports: By Sender from 2/20/2019 to 5/21/2019.

| Hide | Sender | Send Rate Metric | Reply Rate Metric | Score Metric | Pct Below Acceptable | Consistency Metric | Feedback Quotient® |
|--------------------------|-------------------|------------------|-------------------|--------------|----------------------|--------------------|--------------------|
| <input type="checkbox"/> | Brendan Welsh | 107 % | 37 % | 0 % | 0.0 % | 200 % | 90 |
| <input type="checkbox"/> | Lynne Nischwitz | 77 % | 122 % | 231 % | 0.0 % | 56 % | 115 |
| <input type="checkbox"/> | Mason Malcom | 36 % | 305 % | 262 % | 0.0 % | 157 % | 141 |
| <input type="checkbox"/> | Megan Cyr | 179 % | 147 % | 212 % | 0.0 % | -160 % | 111 |
| <input type="checkbox"/> | Mike Keller | 281 % | 81 % | 195 % | 0.0 % | -153 % | 116 |
| <input type="checkbox"/> | Nick McCullough | 36 % | 37 % | 0 % | 0.0 % | 200 % | 81 |
| <input type="checkbox"/> | Patrick Warnement | 36 % | 37 % | 0 % | 0.0 % | 200 % | 81 |
| <input type="checkbox"/> | Randy Wolfe | 72 % | 37 % | 0 % | 0.0 % | 200 % | 85 |
| <input type="checkbox"/> | Troy Messer | 36 % | 37 % | 0 % | 0.0 % | 200 % | 81 |

© 2019 Client Feedback Tool | US Patent #12238217

clientfeedbacktool
THE POWER OF FEEDBACK

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Home Ask **Review** Follow Up My Firm Preferences Resources Support

Update Reset File Filters Options

Date Range Phase or Event
Tags Survey

Project or Group
Project Type
Project Manager

Recipient
Company
Sender

Client Manager

Project Client
Company Type
Service Provided

Survey Type

Basic Filters Project Filters People Filters Client Filters Survey Type Filters

Unfinished Surveys

Surveys Sent By: Brendan Welsh

| Project | Survey Template | Recipient | Send Date | Close Date | Re-Open Survey |
|--|----------------------|---------------|-----------|------------|----------------|
| Goodyear Lawton Calendar Scan Areas 1-4 (190083,000) | General Satisfaction | Jon McFarland | 05/07/19 | 05/21/19 | Edit |

Surveys Sent By: Lynne Nischwitz

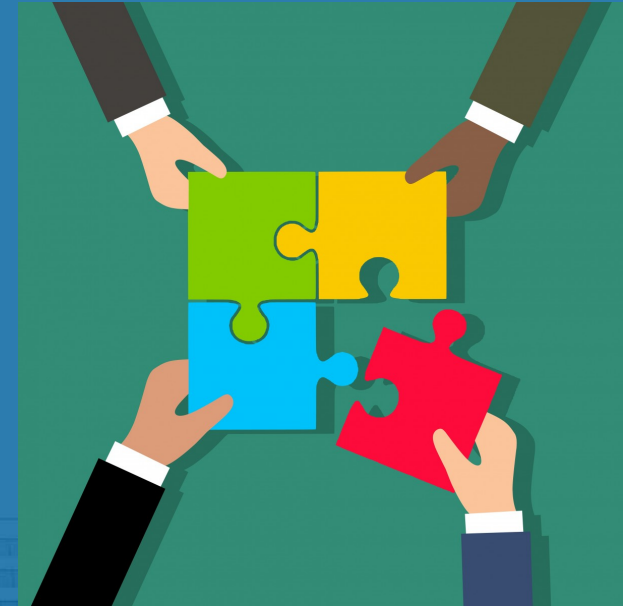
| Project | Survey Template | Recipient | Send Date | Close Date | Re-Open Survey |
|--|----------------------|--------------|-----------|------------|----------------|
| Colonel Glenn Beavercreek Streetscape (180392,000) | General Satisfaction | Nick Smith | 05/03/19 | 05/17/19 | Re-Open |
| Colonel Glenn Beavercreek Streetscape (180392,000) | General Satisfaction | Jeff Moorman | 05/03/19 | 05/17/19 | Re-Open |

Our Analytics Goal

- View CX data on project dashboards
- Monitor Sends
- Report NPS values

Automation

- Send surveys from dashboards
- Send surveys automatically





Questions & Discussion

Connect With Us



Clearview
Software



cvsoftware



Clearview
Software