Using Analytics to Visualize CX

CLEARVIEW

What We'll Cover

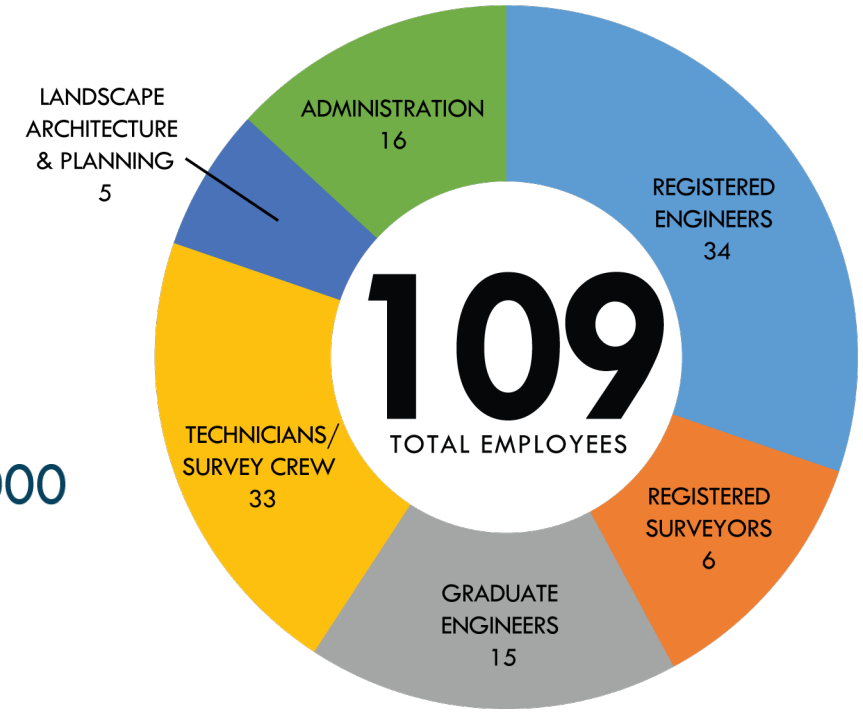
- The Kleingers Group
- Why CX?
- How CX?
- What's missing?
- Doing more with the data.
- Discussion

CLEARVIEW

ABOUT THE KLEINGERS GROUP

EST. 1993
26
YEARS
-OF SERVICE-

CURRENT STAFFING



GROSS BILLING

16,200,000

MARKETS SERVED

- EDUCATION
- OFFICE
- RETAIL
- HEALTHCARE
- INDUSTRIAL
- GOVERNMENT
- ROADWAY
- SURVEY
- LANDSCAPE
- MIXED-USE
- WATER RESOURCES
- SPORTS

11 LEED ACCREDITED PROFESSIONALS

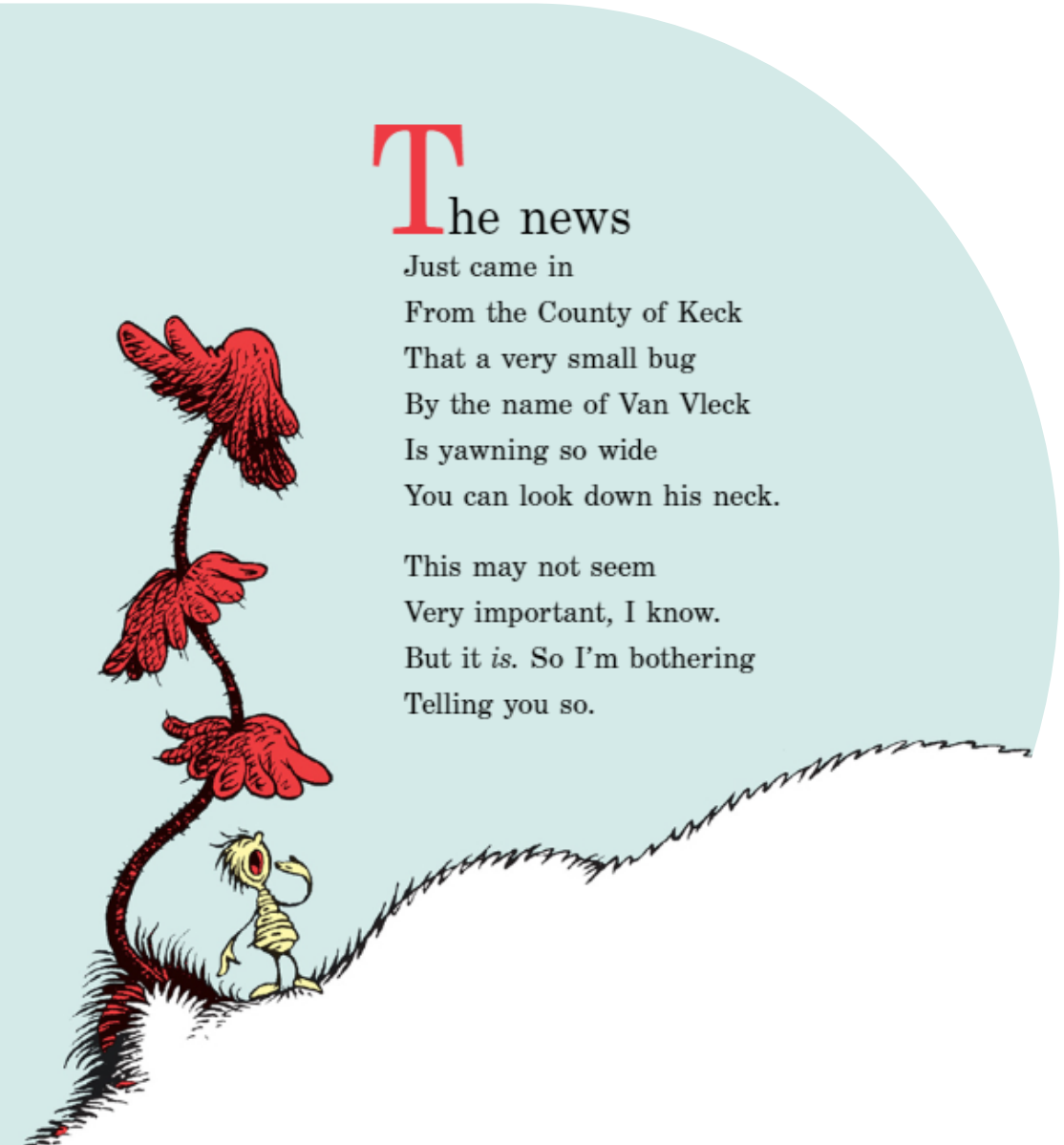
THE KLEINGERS GROUP

KLEINGERS' CORE VALUES
SINCE DAY 1

THE KLEINGERS GROUP

Tribal stories become your culture

CULTURE



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

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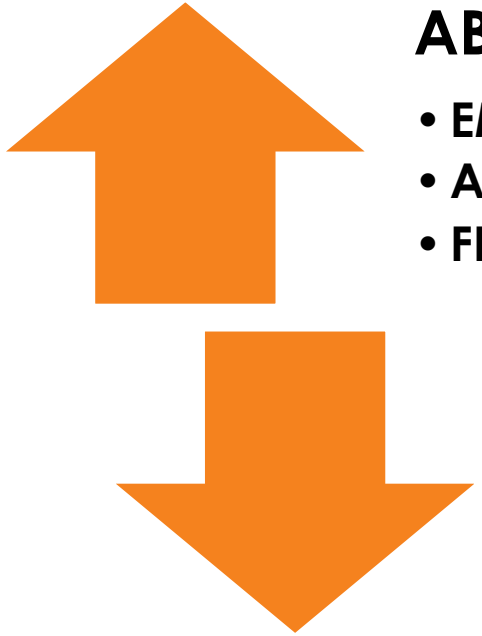
CHARACTERISTICS



ABSOLUTELY

- **EMPOWERMENT**
- **AUTONOMY**
- **FLEXIBILITY**

NOT AS MUCH

- **RULES**
- **STANDARDS**
- **CONSISTENCY**

10 - 15

SELLER-DOER
MARKET LEADS

20 - 25

PROJECT MANAGERS

1000 ±

ACTIVE PROJECTS

½ DAY

SHORT PROJECTS

3+ YEAR

LONGER PROJECTS

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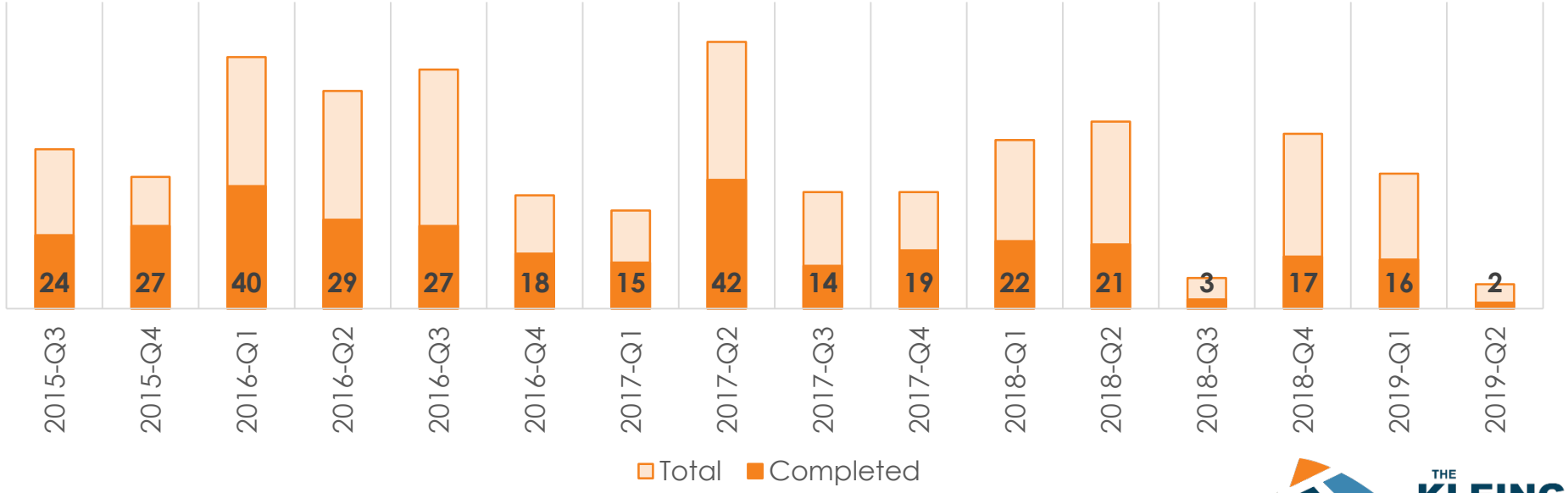
CFT SURVEYS SENT

	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



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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*

THE KLEINGERS GROUP

“OPPORTUNITIES”

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

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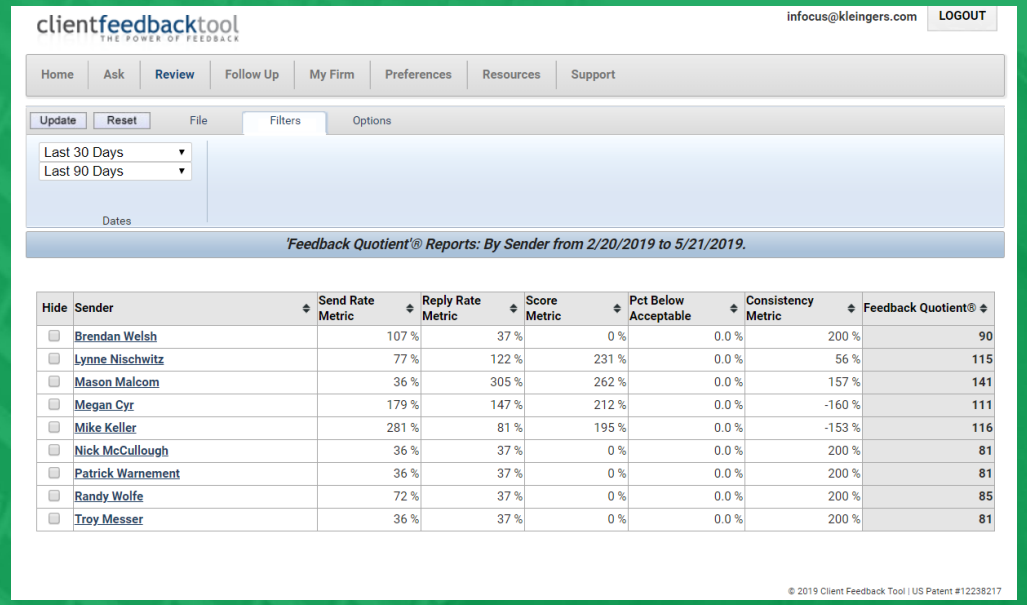
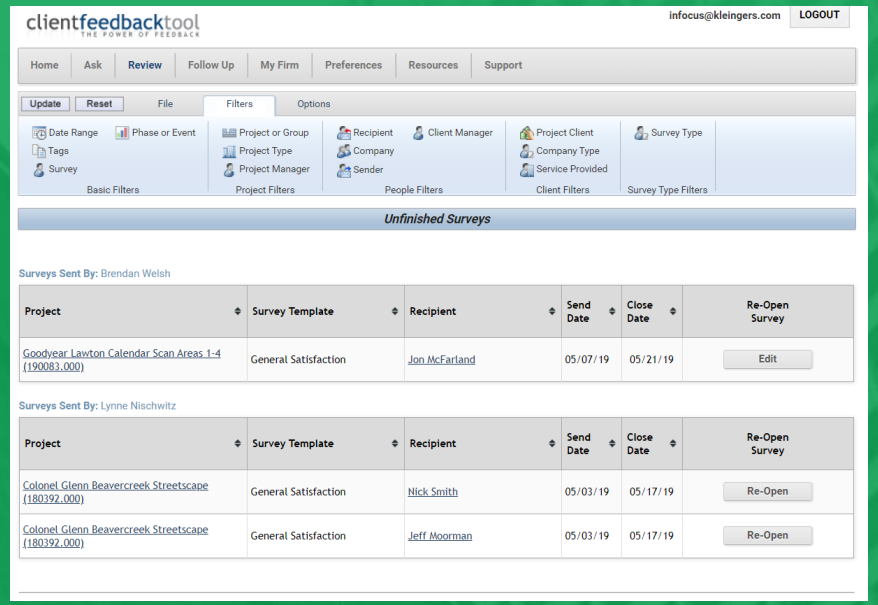
Existing Analytics





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Our Analytics Goal

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

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Automation

- Send surveys from dashboards
- Send surveys automatically

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Questions & Discussion

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