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Traditional wisdom says that in order to increase loyalty, companies must please customers by exceeding service expectations. A large-scale study of contact center and self-service interaction, however, finds that what customers really want (but rarely get) is just a satisfactory solution to their maintenance problem. Reps should focus on reducing the effort that customers need to make. This increases the likelihood that they will return to the company, increase the amount they spend there, and talk positively (and not negatively) about it, in other words, that they will become more loyal. To meet customer expectations, representatives must anticipate and lead the need for follow-up calls, address the emotional side of interaction, minimize the need for customers to switch service channels, listen and learn from disgruntled customers, and focus on problem solving rather than speed. The idea that companies should please their customers is so ingrained that managers rarely study it. But ask yourself: How often does someone patronize a company precisely because of its over-the-top service? You can probably think of a few examples, such as a traveler who makes a point of returning to a hotel that has particularly attentive staff. But you probably can't come up with much. Now ask yourself: How often do consumers knock out companies because of terrible service? All the time. They take revenge on airlines that lose their bags, cable providers whose appliances make them wait, cellular companies whose representatives put them on permanent hold, and dry cleaners who don't understand what a rush order means. Most customers face problems that undermine loyalty when they interact with customer service. 56% report the need to re-explain the issue of the 57% report having to go from the Internet to phone 59% report wasting moderately-high efforts to address the issue of 59% report transmitted by 62% report having to repeatedly contact the company to solve the problem of Finding this and other HBR graphics in our self-service visual library consumer impulse to punish poor service- at least more easily than to reward delightful service-plays sharply in phone-based and that are the largest customer service channels of most companies. In these circumstances, our research shows loyalty has much more to do with how well a company delivers on its basic, even simple vanilla promises, than about how dazzling a service experience can be. However, most companies have failed to realize this and pay dearly in terms of wasted investment and lost customers. Service failures don't just take you out customers for defects, but can also reflect potential. Our study shows: 25% of customers are more likely to say something positive about their customer service experience 65%, most likely to say negatively to 23% of customers who have had a positive service service told 10 or more people about this 48% of customers who had a negative experience said 10 or more others Find this and other HBR graphics in our visual library to explore the links between customer service and loyalty, the Customer Contact Board, a division of the Corporate Executive Board, conducted a study of more than 75,000 people who interacted over the phone with contact center representatives or through self-service channels such as voice-language channels , chat and email. We have also conducted hundreds of structured interviews with customer service executives and their functional partners in large companies around the world. (For more information, see the sidebar about the study.) Our study focused on three questions: How important is customer loyalty service? Which customer service activities increase loyalty and which don't? Can companies increase loyalty without increasing customer service operating costs? We have defined loyalty as the intention of customers to continue to do business with the company, increase their expenses or say good things about it (or refrain from bad things). Over a three-year period, we interviewed more than 75,000 B2C and B2B customers about their recent interactions with services in major hard-hitting channels, including direct phone calls, voice cues, web pages, chat rooms and emails. The companies represent dozens of industries, ranging from consumer electronics and packaged goods to banking, travel and leisure, North America, Europe, South Africa, Australia and New York. We have identified elements of each interaction that have led customer loyalty, both positively and negatively, and are monitored for variables, including the type of service issue, whether handled in-house or outside the contact center, representative stay in the company, company size, customer type, customer mood before interaction, switching costs, frequency with which ads have been noticed or heard, perceived quality and value of products, product price, industry and specific company. Finally, we conducted several hundred structured interviews to understand in detail the company's customer service strategies and operations. Although our study focused solely on contact center interactions, it is intuitive that the results are applicable to face-to-face meetings. There are two important findings that should affect each company's customer service strategy. First, customer enjoyment does not create loyalty; reducing their efforts - the work they have to do to get their problem solved-does. Second, a conscious understanding of this view can help improve customer service, reduce customer service and reduce customer outflows. Trying too hard according to conventional wisdom, customers are more loyal to firms that go beyond. But our research research that exceeding their expectations during service interactions (e.g. offering a refund, a free product, or a free service such as expedited delivery) makes customers only marginally more loyal than simply meeting their needs. For executives who have cut their teeth in the service department, this is a worrying conclusion. Which contact center does not have a wall plastered with emails and emails from customers praising the extra work that service representatives went on their behalf? Indeed, 89 out of 100 customer service managers we survey said their main strategy was to exceed expectations. But despite these herculean and costly efforts, 84% of customers told us that their expectations were not exceeded during their last interaction. One reason for focusing on exceeding expectations is that 80% of customer service organizations use Customer Satisfaction Assessment (CSAT) as the primary indicator for evaluating customer experience. And managers often assume that the more satisfied customers are, the more loyal they will be. But like others before us (primarily Fred Reicheil), we find little relationship between satisfaction and loyalty. Twenty percent of satisfied customers in our study said they intend to leave the company in question; 28% of disgruntled customers intended to stay. The picture becomes even darker. While customer service can do little to increase loyalty, it can (and usually does) do much to undermine it. Customers are four times more likely to leave interaction with the service disloyal than loyal. Another way to think about customer loyalty sources is to imagine two pies, one containing things that drive loyalty and the other containing things that drive disloyalty. The loyalty pie consists mainly of slices such as product quality and brand; The piece for service is quite small. But the service accounts for most of the disloyal pie. We buy from the company because it provides quality products, great value, or compelling brand. We leave one, more often than not, because it is unable to deliver on customer service. Make it easy Let's get back to the key implications of our research: When it comes to service, companies create loyal customers first, helping them solve their problems quickly and easily. Armed with this understanding, we can fundamentally change the focus of customer interaction. Framing a call service in terms of making it easy for the customer can be quite illuminating, even liberating, especially for companies that are struggling to please. Talking frontline reps to exceed customer expectations to give confusion, wasted time and effort, and expensive giveaways. Telling them to do this easily gives them a solid foundation for action. Telling reps to exceed customer expectations is prone to confusion, wasted and effort, and expensive prizes. What exactly does it mean to make it easy? Simple: Remove obstacles. We have identified several recurring complaints about interaction with the service, including three that specifically focus on customer efforts. Customers resent the need to contact the company repeatedly (or be referred) to get the problem resolved, having to repeat the information, and having to move from one service channel to another (for example, you need to call after trying unsuccessfully to solve the problem through the website). More than half of the clients surveyed reported difficulties of this kind. Companies can reduce these types of efforts and measure effects with a new metric, Customer Effort Assessment (CES), which assigns scores of 1 to 5, with 5 represent a very high effort. (For more information, see the SideBar Introduction of Customer Effort Assessment.) We evaluated the predictive power of three metrics: Customer Satisfaction (CSAT), Net Promoter Score (NPS) and the new metric we have developed, Customer Effort Assessment (CES)-on Customer Loyalty, defined as the intention of customers to continue to do business with the company, increase the amount they spend, or distribute positive (rather than negative) word of mouth. No wonder CSAT was a bad predictor. NPS turned out to be better (and it was shown to be a powerful sensor at the company level). CES has surpassed both customer service interactions. CES is measured by asking one question: How much effort did you personally have to put forward to process your request? He scored on a scale of 1 (very low effort) to 5 (very high effort). Customer service organizations can use CES, along with operational measurements of things such as re-calls, transmissions and channel switching, to conduct audit efforts and improve areas where customers spend non-essential energy. Many of the companies we work with use CES to intervene with customers who risk deserting. We have found that the predictive power of CES is indeed strong. Of the customers who reported low efforts, 94% expressed their intention to buy back, and 88% said they would increase their spending. Only 1% said they would talk negatively about the company. Conversely, 81% of customers who found it difficult to solve their problems reported their intention to spread negative word of mouth. We believe that CES's superior performance in the service environment stems from two factors: its ability to capture customer experience at the transactional level (unlike NPS, which captures a more holistic impression of the company) and its ability to capture negative experiences as well as positive ones. The appropriate diagnostic tool, an audit of the efforts of customers, can be downloaded by In the course of our research, we saw many companies that have successfully implemented approaches to service. Below are five tactics that they used- tactics that each company should adopt. 1. Don't just solve the current problem- head off the next. Today, the main reason for excessive efforts of customers is the need to call back. Many companies believe that they are working well in this regard because they have strong first contact resolution (FCR) scores. (See the sidebar What should you measure?) However, 22% of repeated calls involve downstream issues related to the problem that prompted the original call, even if the problem itself was adequately resolved for the first time. While companies are well-equipped to predict and further address these issues, they rarely do so, usually because they are too focused on managing call times. They need to understand that customers appreciate the effort they spend not only in terms of how an individual call is handled, but also depending on how the company manages the evolving service events, such as taking out a mortgage or creating a cable service that usually requires multiple calls. The number one reason for undue efforts for customers interacting with contact centers is the need to call back because their problem was not solved on the first attempt. Companies trying to measure how well representatives solve problems in a single call typically use the First Contact Resolution Metric (FCR), but completely half the time that doesn't contain information about re-calls or their causes. Tracking repeat calls over a period (we recommend seven to 14 days) is not only easier than measuring FCR, but also throws a wider network by capturing implicit, or non-obvious, reasons customers call back, such as downstream issues or emotional break with a representative. A word of caution: Tracking repeat calls instead of using FCR inevitably makes performance seem worse. However, we believe that this is a much better way to discover and eliminate the sources of undue customer efforts and that it can help companies increase loyalty in a way FCR cannot. Bell Canada has accomplished this task by extracting its customer interaction data to understand the relationship between different customer issues. Using what he learned about cluster events, Bell began training his representatives not only to solve the client's underlying problem, but also to predict and solve common downstream problems. For example, a high percentage of customers who ordered a specific feature were interrupted to receive instructions on how to use it. Company service representatives now give a quick tutorial to customers about the key aspects of the feature before they hang up. This kind of forward Bell reduced its calls for the event by 16% and the outflow of customers by 6%. For complex problems downstream, it will take excessive time to resolve the initial call, the company sends follow-up emails, for example, explaining how first payment statement. Bell Canada is currently weaving this issue of forecasting approach into a challenge routing experience for the customer. Fidelity uses a similar concept on its self-service website, offering customers proposed next steps to perform certain transactions. Often customers who change their address online call later to order new checks or ask about homeowners' or tenants' insurance; thus, Fidelity directs them to these topics before they leave the site. Twenty-five percent of all self-service transactions on the Fidelity website are now generated by similar next-issue requests, and calls to the household have fallen by 5% since the policy began. 2. Arm representatives to address the emotional side of customer interaction. Twenty-four percent of the repeated calls in our study stem from emotional gaps between customers and representatives-situations in which, for example, the customer does not trust the representative's information or dislike the response, and it was the impression that the representative was simply hiding behind the company's overall policy. With some basic instructions, representatives can eliminate many interpersonal problems and thereby reduce repeated calls. One British mortgage company teaches its representatives how to listen to tips to the type of customer personality. They quickly assess whether they are talking to the controller, thinker, feel, or entertainer, and adapt their responses accordingly, offering the customer a balance of details and speed corresponding to the type of personality diagnosis. This strategy has reduced repeated calls by a remarkable 40%. One company teaches its representatives how to listen to the keys to the customer's personality type and adapt their responses accordingly. Light company Osram Sylvania sifts through its call transcripts to identify words that tend to cause negative reactions and drive repeated calls-words as can't, won't, and won't - and coaches its repetitions on alternative formulations. Instead of saying: We don't have this item in stock, a representative can explain: We'll have stock availability for that item for two weeks. Thanks to such simple changes in language, Osram Sylvania has reduced its customer effort account from 2.8 to 2.2-18.5% below the average we see for B2B companies. LoyaltyOne, the operator of the AIR MILES reward program, teaches representatives to probe information they can use to better position potentially disappointing results. A representative dealing with a customer who wants to redeem miles for an unavailable flight can find out that the caller is going to an important business meeting and use this fact to put a positive spin on the need to book another flight. A representative may It sounds like it's something you can't be late for. On Monday morning the flight is not available, but with potential delays, you would be cutting it it Still. I would recommend a Sunday night flight so you don't risk missing the meeting. This strategy has resulted in an 11% reduction in re-contacts. 3. Minimize channel switching by increasing self-service channel stickiness. Many companies ask: How can we get our customers to go to our self-service site? Our research shows that in fact many customers were already there: Fifty-seven percent of incoming calls came from customers who went to the site in the first place. Despite their desire to let customers turn to the Internet, companies tend to resist making improvements to their sites, suggesting that only big costs and technology upgrades will encourage customers to stay there. (And even when expensive upgrades are made, they often prove counterproductive because companies tend to add complex and confusing features in an attempt to keep up with their competitors.) Customers can become overwhelmed by the abundance of self-service channels of interactive voice response, websites, email, chat, online support community, social media such as Facebook and Twitter, and so on, and often do not have the opportunity to make the best choice for themselves. For example, technically unsophisticated users left on their own devices can move to high-quality online support communities. As a result, customers can spend a lot of effort bouncing between channels, only to pick up the phone after all. Cisco Consumer Products now directs customers to the channel that it believes will best suit them, based on specific hypotheses generated by the company's customer service team. The language on the site's homepage pushes the technology guru to the online support community; those with less technical knowledge are sent to articles of knowledge, promising simple step-by-step instructions. The company eliminated the email option after discovering that it did not reliably reduce customer efforts. (Our study shows that an average of 2.4 e-mails are required to solve the problem, compared to 1.7 calls.) When Cisco Consumer Products launched this program in 2006, only 30% of its customer contacts were processed through self-service; today the figure is 84 per cent, and the volume of calls has decreased accordingly. Travelocity has reduced customer efforts only by improving its website's help section. He learned that many customers who were looking for solutions there were stymied and resorted to the phone. By eliminating jargon, simplifying the layout and otherwise improving readability, the company doubled the use of its top searches and reduced the number of calls by 5%. 4. Use feedback from disgruntled or struggling customers to reduce customer efforts. Many companies By mail to measure internal performance however, they may neglect to use the data they collect to learn from disgruntled customers. But consider the National Australia Group group The company has front-line representatives specially trained to call customers who have given it low marks. Representatives initially focus on solving customer problems, but they also collect feedback that reports improvements in service. The level of resolution of the company's problems increased by 31%. Such training and intervention is not limited to the telephone channel. Some companies monitor online behavior to identify customers who are experiencing difficulties. EarthLink has a dedicated rep team that step in as needed with customers on its self-service website, for example by initiating a chat with a customer who has spent more than 90 seconds at the knowledge center or clicked on contact with us link. This program has reduced calls by 8%. Empowering the front line to ensure a low-work experience. Incentive systems that value speed over quality can be the biggest barrier to reducing customer effort. Most customer service organizations continue to emphasize performance indicators, such as the average processing time when assessing rep performance. They would be better off removing the performance of governors who would put the way to make the customer experience easy. The Australian telecoms provider has excluded all performance indicators from its performance figures. Although processing time increased slightly, repeated calls fell by 58%. Today, the company evaluates its representatives solely on the basis of short, direct interviews with customers, essentially asking them if the service they received so they meet their needs. Freed to focus on reducing the efforts of customers, front-line representatives can easily choose low-hanging fruit. Ameriprise Financial, for example, asks its customer service representatives to capture every case in which they are forced to tell the customer no. When audited, the company found many outdated policies that were out of date as a result of regulatory changes or system or process improvements. During the first year of its takeover there, Ameriprise changed or eliminated 26 policies. It has since expanded the program, asking Front representatives to come up with other process efficiencys, generating $1.2 million in savings as a result. Some companies have gone even further, making low-effort customers the cornerstone of their offer of service value and branding. For example, South African Nedbank has introduced the AskOnce promise, which ensures that the representative who picks up the phone will own the customer's problem from start to finish. The immediate mission is clear: corporate executives should focus their service organizations on mitigating disloyalty at the expense of clients' efforts. But service managers, worried about how to reining their contact centers - departments built on the foundation, delighting the customer - should take this into account: there is a massive shift in terms of customer preferences in service. While most companies that customers overwhelmingly prefer self-service live phone services, our latest data shows that customers are, in fact, indifferent. This is an important tipping point and is likely to pre-set the end of the phone service as the main channel for customer service interaction. For enterprising service managers, this provides an opportunity to rebuild their organization around self-service and, in the process, put the reduction effort of customers firmly in the center where it belongs. A version of this article appeared in the July-August 2010 issue of Harvard Business Review. 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