



OPEN-LINE
Customer Experience Improvement Tool™



General Introduction

Version 1.3.5
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“What you don’t know, *can* hurt you.”

To avoid the effort, or an expected confrontation, customers can be reluctant to report the problems they experience, choosing rather to disengage or to complain to friends and colleagues.



It can cost much more to replace a customer than to keep that customer satisfied . . . perhaps five times as much or more.

One dissatisfied customer can discourage many prospective, as well as current, customers . . . perhaps hundreds on social networks.

Recognizing these risks, and guided by behavioral research and extensive testing, IBRC developed OPEN-LINE.

The Challenge

How do you find your customers' unreported problems ... while you still have a chance to do something about them?

How do you make sure those problems are solved to each customer's satisfaction?

How do you stay in front of your customers in an unimposing and helpful way?

How do you collect and profitably use positive feedback and suggestions from your customers?

How do you monitor – never mind improve – the experiences your customers have with your organization?

How do you do all this effectively – given limited resources – for all your customers?

Introducing ... OPEN-LINE

- OPEN-LINE is a simple-to-use, on-line tool that proactively solicits feedback from your customers via email and the web.
- OPEN-LINE allows your customers to register problems, compliments, and ideas directly to you through a personalized URL provided in an email "check-in."
- OPEN-LINE automatically notifies you when feedback is received. It establishes a feedback-loop with your customers so their issues are never closed without their agreement. And, it escalates "forgotten" issues to designated managers so customer issues are never lost.
- OPEN-LINE provides a real-time window into every customer's "state of experience" for you to oversee.

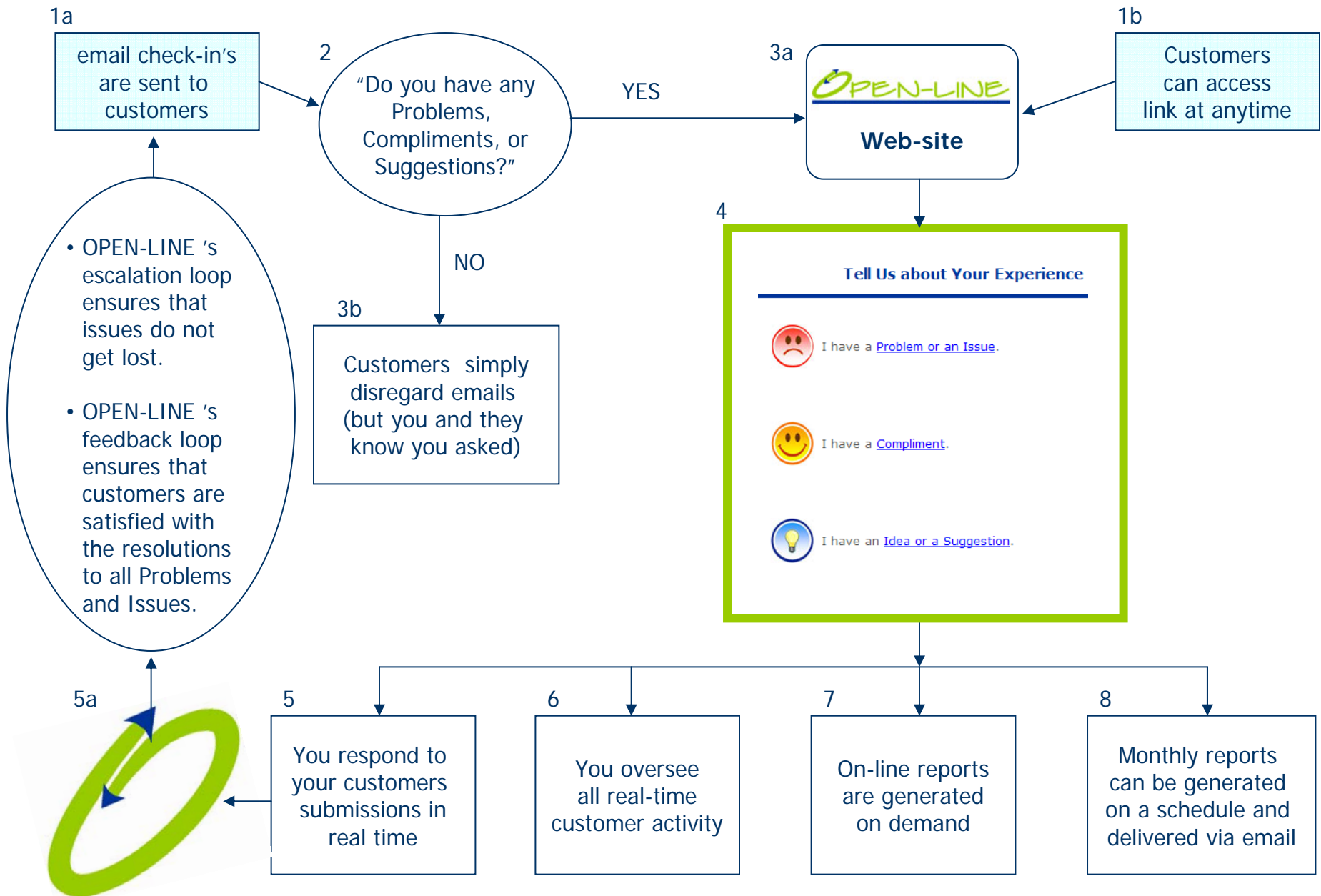
Think of OPEN-LINE as your “Safety Net”

You may already have systems in place to handle customer questions, complaint resolution, and marketing. OPEN-LINE supports, but doesn't replace or depend on, these systems:

- Customer Relationship Management
- Sales Force Automation
- Marketing Automation
- Email Marketing
- Call Center Management
- Help Desk/Service Desk Management
- Customer Service Software
- Online Surveys
- Retention Management
- Enterprise Feedback Management

OPEN-LINE is designed to *pro-actively* search for and prompt customers who might otherwise “fall through the cracks” so you can bring your customers back “just in time” and continuously improve your support systems.

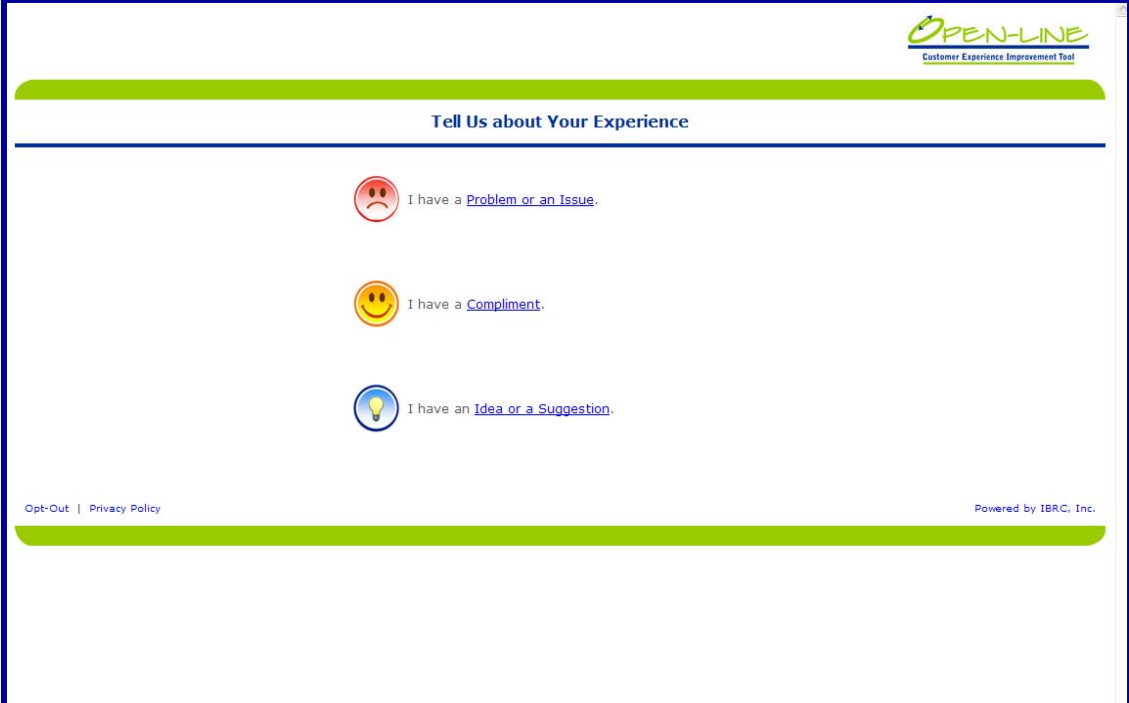
How Does It Work?



What Will Your Customers See?

The process starts when Open-Line sends an email check-in to your designated customers looking for problems and issues (or compliments, comments, suggestions, or ideas).

Customers simply click the link embedded in the check-in email to access Open-Line and, then, click the appropriate icon to continue.



The screenshot displays the Open-Line Customer Experience Improvement Tool interface. At the top right, the logo for "OPEN-LINE Customer Experience Improvement Tool" is visible. Below the logo, a green horizontal bar contains the text "Tell Us about Your Experience". The main content area features three options for feedback, each with a corresponding icon and a link:

- A sad face icon with the text "I have a [Problem or an Issue](#)."
- A happy face icon with the text "I have a [Compliment](#)."
- A lightbulb icon with the text "I have an [Idea or a Suggestion](#)."

At the bottom left, there is a link for "Opt-Out | Privacy Policy". At the bottom right, it states "Powered by IBRC, Inc.". The interface is framed by a blue border.

What Will Your Customers See?

Customers enter their feedback in their own words (you determine what, if any, additional information you also want them to provide).

The screenshot shows a web form titled "OPEN-LINE Customer Experience Improvement Tool". At the top right is the logo. Below the logo is a green horizontal bar, followed by a yellow smiley face icon. The form is divided into two main sections: "Please Verify Your Contact Information" and "Please Provide Some Details".

Please Verify Your Contact Information

Demo Customer

Company:

Email:

Work Phone:

Please Provide Some Details

▶ Your Experience with:

▶ About That Experience:

▶ Indicates a required field.

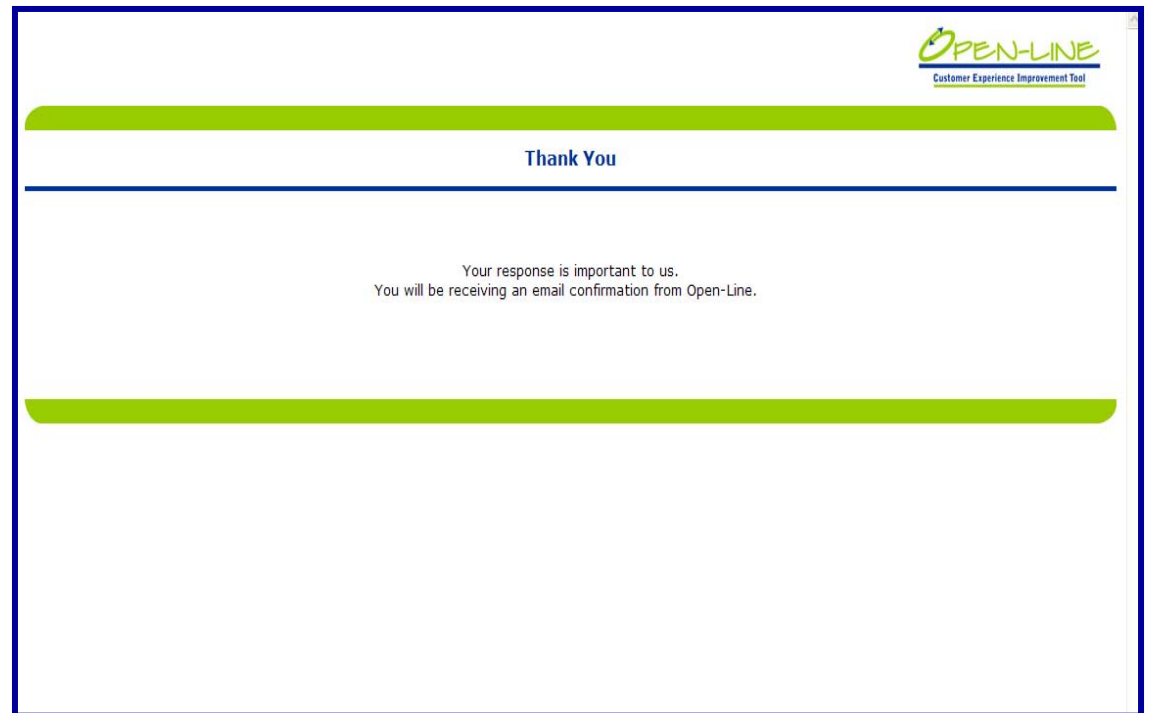
▶ **Please Tell Us What's On Your Mind:**

Opt-Out | Privacy Policy Powered by IBRC, Inc.

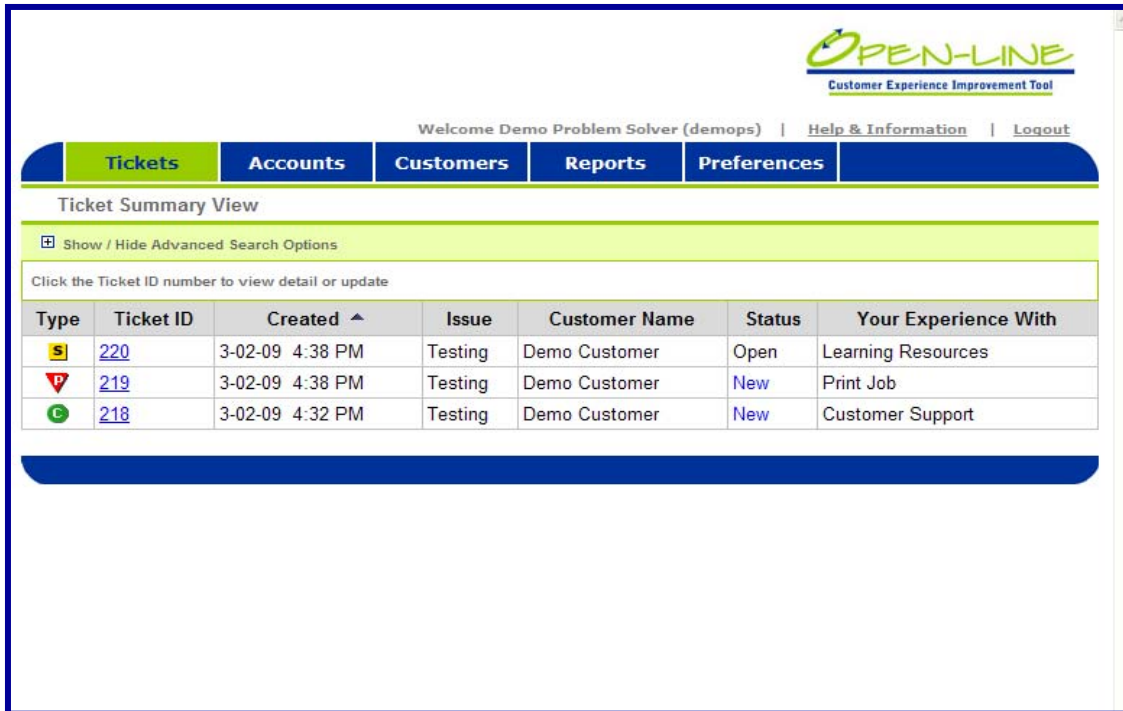
What Will Your Customers See?

Open-Line follows up with a “thank you” and a confirmation e-mail.

The entire process takes only a few minutes.



What Will You See?



The screenshot displays the Open-Line Customer Experience Improvement Tool interface. At the top right is the logo for OPEN-LINE, with the tagline "Customer Experience Improvement Tool". Below the logo, a navigation bar contains the following tabs: Tickets (highlighted), Accounts, Customers, Reports, and Preferences. A secondary navigation bar includes "Welcome Demo Problem Solver (demops)", "Help & Information", and "Logout".

The main content area is titled "Ticket Summary View" and includes a "Show / Hide Advanced Search Options" button. Below this, a instruction reads "Click the Ticket ID number to view detail or update".

Type	Ticket ID	Created ^	Issue	Customer Name	Status	Your Experience With
	220	3-02-09 4:38 PM	Testing	Demo Customer	Open	Learning Resources
	219	3-02-09 4:38 PM	Testing	Demo Customer	New	Print Job
	218	3-02-09 4:32 PM	Testing	Demo Customer	New	Customer Support

The Open-Line console lets you view all feedback (organized as “tickets”) submitted by customers.

Watch in real-time as feedback comes in and is handled by you or by whomever you designate.

What Will You See?

The screenshot displays the OPEN-LINE Customer Experience Improvement Tool interface. At the top, there is a navigation bar with tabs for Tickets, Accounts, Customers, Reports, and Preferences. Below this, a header section shows the current status as 'Open' and the issue type as 'Suggestion'. A table provides details for the ticket, including the customer's name, account, email, phone, and the staff member assigned to the ticket. Below the table, there is a section for 'Most Recent Customer Text' and a 'Ticket Update' form. The form includes a text area for entering update text, a 'Status' dropdown menu, a 'Due Date' field, and dropdown menus for 'Your Experience with' and 'About That Experience'. There are also checkboxes for sending an email to the customer and notifying the problem solver.

Ticket Number: 220		Current Status: Open		Issue Type: Suggestion	
Name: Demo Customer	Account: IBRC's Demo Account	Your Experience with: Learning Resources	Created Date: 03-02-2009 4:38 PM		
Email: democustomer@ibrc.com	Panel: Demo Customer Group	About That Experience: Staff	Due Date:		
Phone: 800-555-1212	Display Name: Demo Customer Group				

Most Recent Customer Text

Testing Modified Date: 03-02-2009 4:38 PM

Ticket Update

Enter Update Text:

Status: Open

Due Date: [Date Picker]

Your Experience with: Learning Resources

About That Experience: Staff

Assigned To: Demo Problem Solver

Check to send email to customer with this update.

Check box to notify Problem Solver of the assigned ticket.

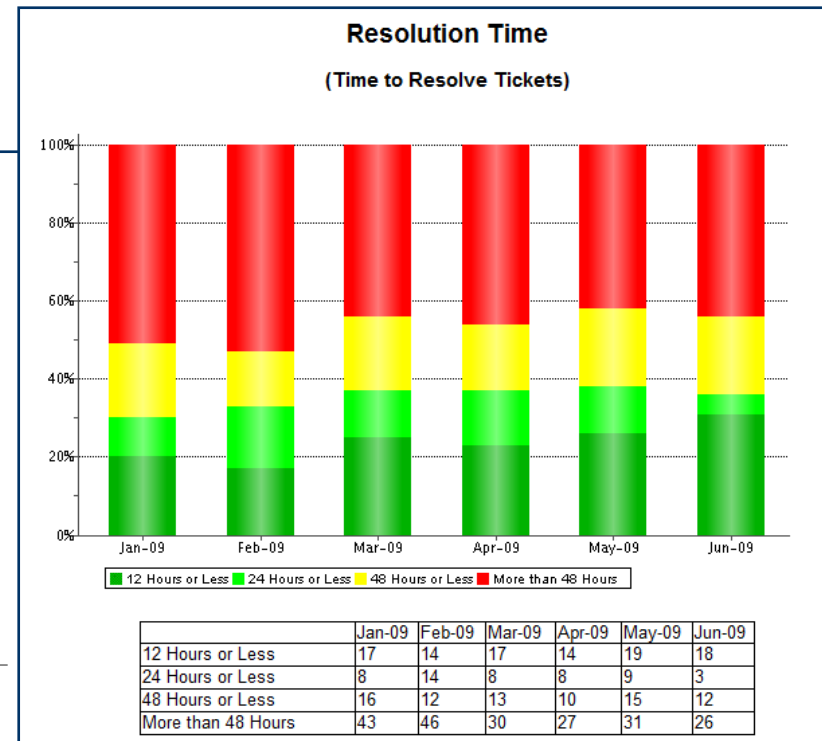
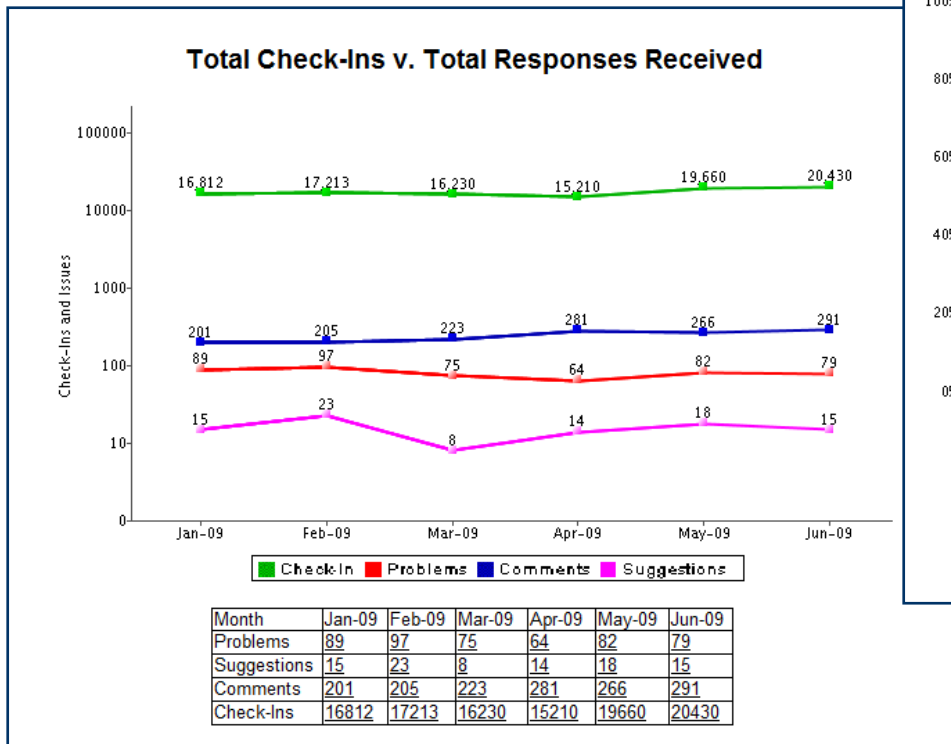
Save

The console provides access to the details of each submission, tracking status *and* customer experience on a one-by-one basis.

What Will You See?

Open-Line reporting lets you assess the customer experience within – or across all – your customers and customer groups, with:

- A library of real-time, on-line reports featuring full, drill-down functionality
- Automated management report distribution
- Ad hoc report capabilities
- Data export options



What might *you experience* with OPEN-LINE ?

- ✓ Identification of policies, behaviors, and operations that should be improved
- ✓ Improved morale, motivation, and performance among employees in response to compliments
- ✓ Improved customer satisfaction scores (as the causes of negative experiences are uncovered and resolved and the drivers of positive experiences are recognized and encouraged)
- ✓ Increased rates of customer repurchases and recommendations
- ✓ Another favorable selling-point when presenting offerings
- ✓ Additional revenue from detected opportunities

Who Uses OPEN-LINE Now?

- 100,000 Xerox customers use the system today.
- OPEN-LINE is based on a licensed and patent-pending concept from Xerox Corporation.¹
- IBRC has been running Xerox's Sentinel Customer Satisfaction Assurance System™ program since 2004, exclusively using IBRC software and services ... the same ones behind OPEN-LINE.
 - 25 countries
 - Ten languages
 - Over 40,000 email check-ins each month
 - Over five years of experience
 - 99.6% up-time rating 24/7/365
 - Proven processes and functionality

Testimonial for

OPEN-LINE is based on the patent-pending Sentinel Customer Satisfaction Assurance System™ (Sentinel), invented and used by Xerox Corporation -- and developed and administered by IBRC, Inc. -- as a proprietary Xerox system since 2004. Now licensed by Xerox, IBRC offers OPEN-LINE to organizations around the world.

Barbara von Bergman, co-inventor of Sentinel, has been Xerox's project manager for the Sentinel program since its inception. As such, she provides an expert perspective on the value and benefits of this unique service.

"Xerox Corporation began using the Sentinel Customer Satisfaction Assurance System™ (Sentinel) in 2004. Each year, Sentinel has more than justified its funding by reducing the "Xerox Revenue at Risk" (the proportion of revenue associated with discovered problems) by an amount many times Sentinel's cost.

"However, Sentinel's special value has come from its reinforcement of trust in the Xerox brand promise among our customers and employees. Regularly detecting and immediately responding to our customers' problems, comments, and ideas individually has become an effective learning experience for Xerox people and a brand advantage.

"Our customers and our people have come to consider Sentinel a critical value add which has resulted in increased retention and loyalty.

"IBRC, the system developer and administrator for the program, has become our trusted partner in Sentinel's reliable and accurate operation over the years. We know firsthand that even the best of ideas can fall short of success without competent, professional execution. IBRC has delivered that year in and year out."

*Barbara von Bergman
Manager, Customer Experience
Xerox Corporation*

How Can You Get on OPEN-LINE?

- Call or email today for a free, no-obligation consultation and online demonstration:

Stewart Morse
Manager, Online Communication Systems
310.560.0677
stewart.morse@ibrc.com

- We'll have you online with OPEN-LINE in no time at all!
- For more information about IBRC, visit www.ibrc.com