



OPEN-LINE

Customer Experience Improvement Tool™



General Introduction

Version 1.4.7
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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 the 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.

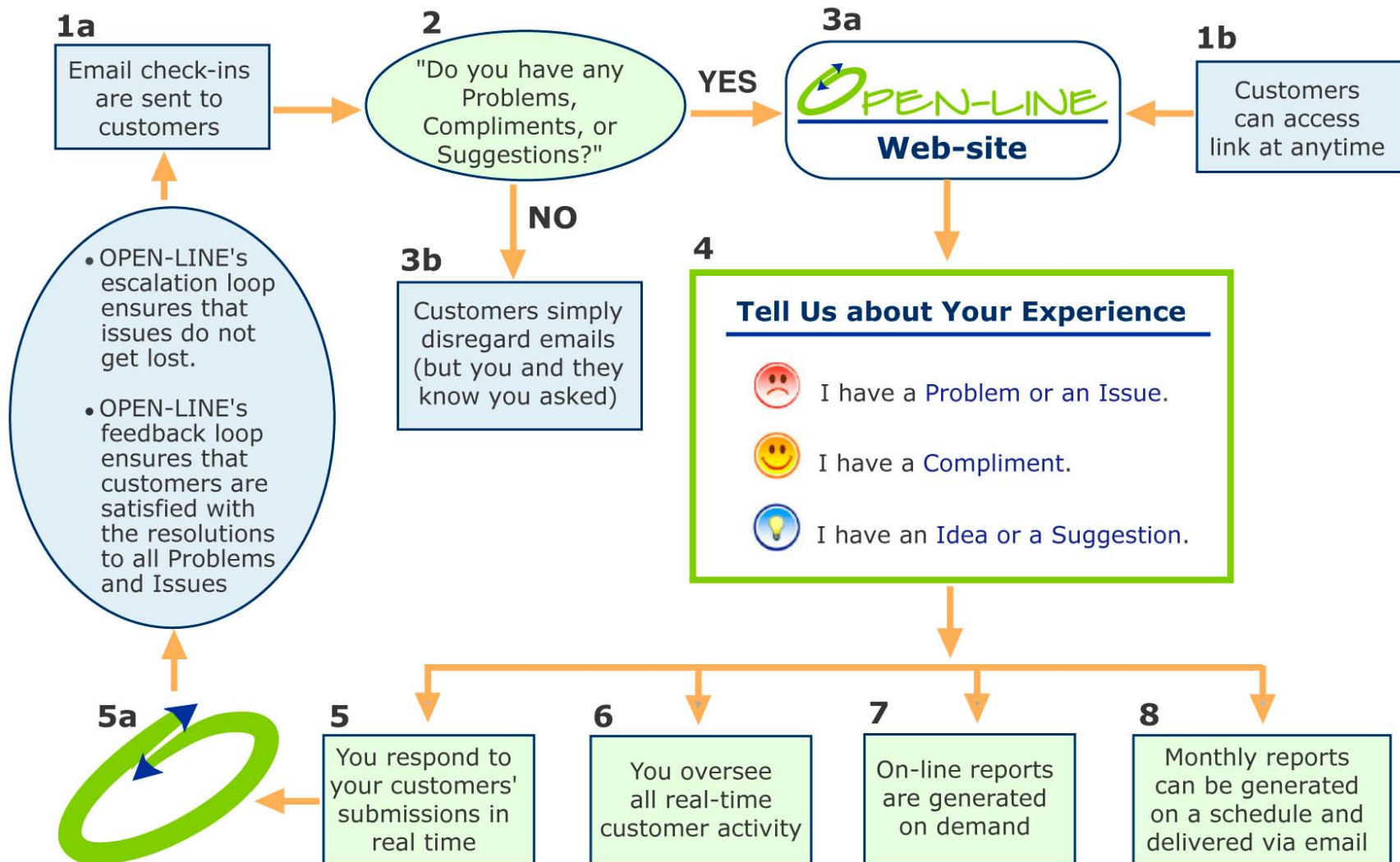
Think of OPEN-LINE as your “Safety Net”

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.

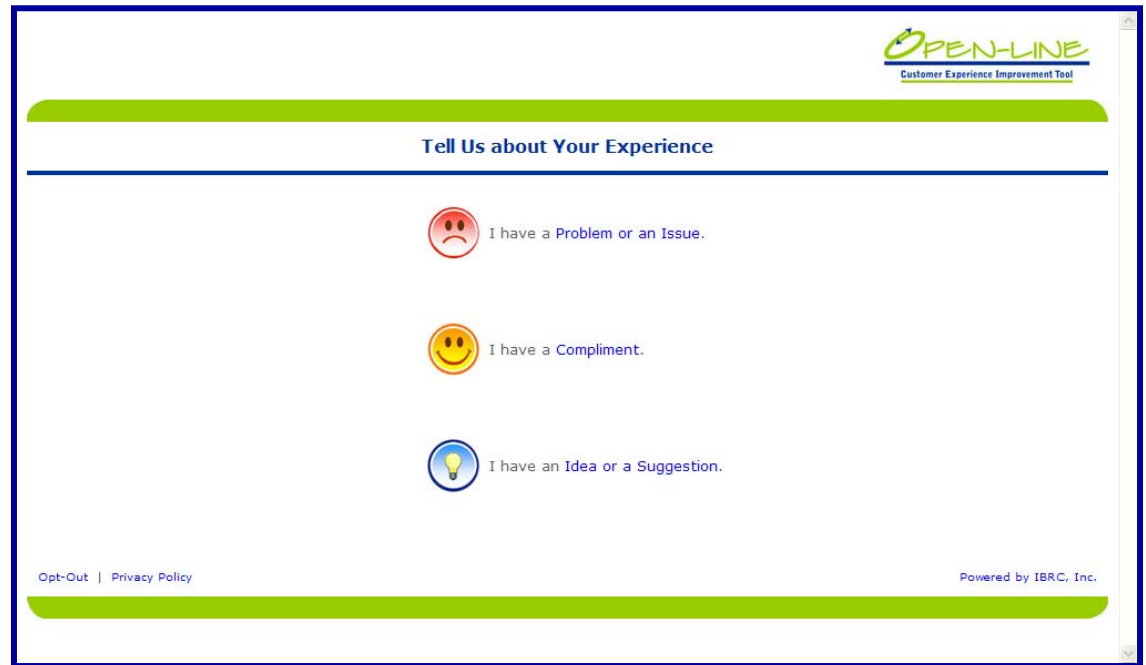
How Does It Work?



What Will Your Customers See?

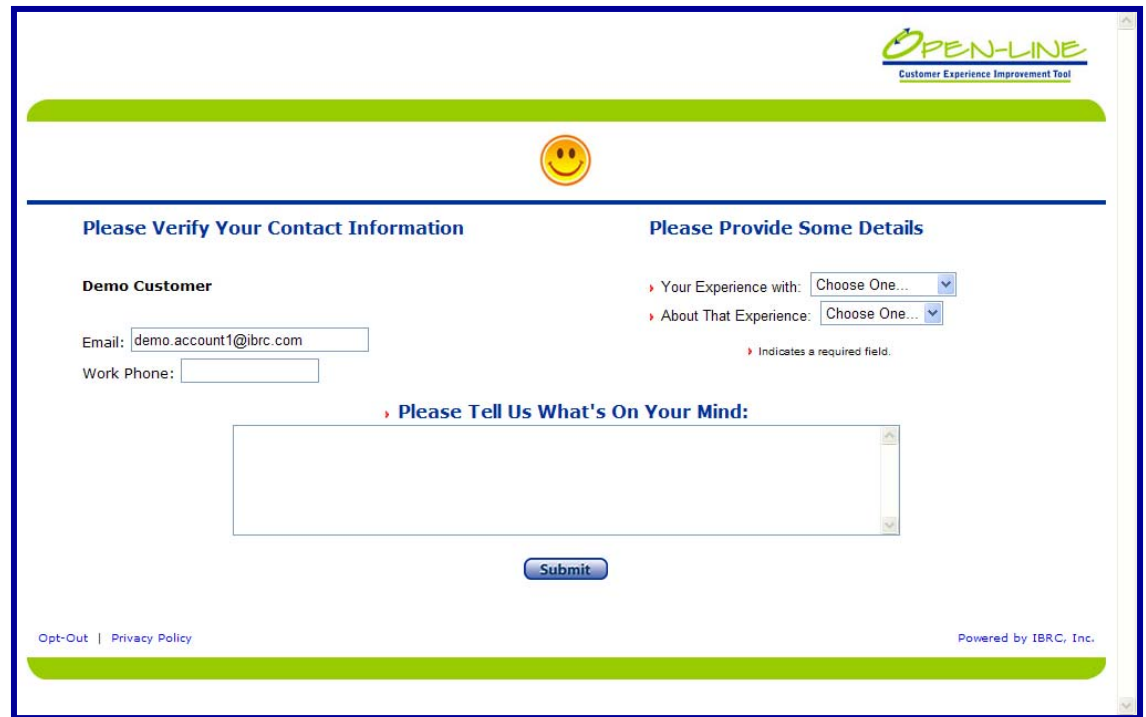
The process starts when Open-Line sends an email check-in to your designated customers looking for problems and issues (or compliments, comments, suggestions, or ideas).

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



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 displays a web form titled "OPEN-LINE Customer Experience Improvement Tool". 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

Email:

Work Phone:

Please Provide Some Details

▶ Your Experience with:

▶ About That Experience:

▶ Indicates a required field.

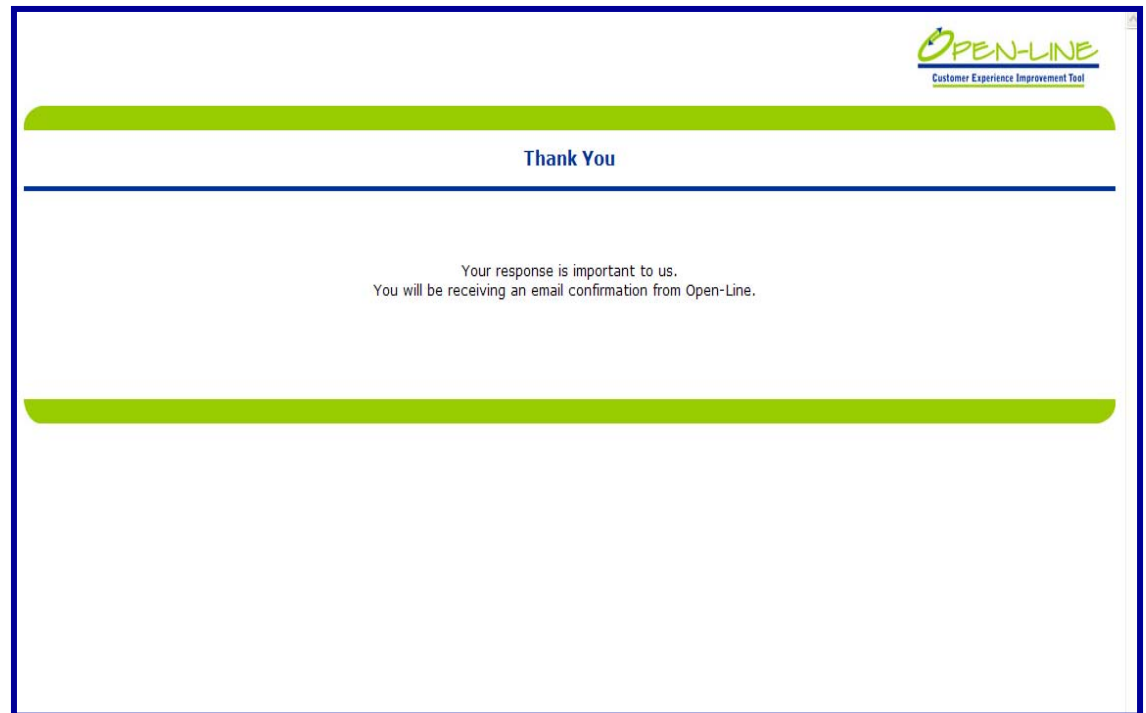
▶ **Please Tell Us What's On Your Mind:**

Opt-Out | [Privacy Policy](#) Powered by IBRC, Inc.

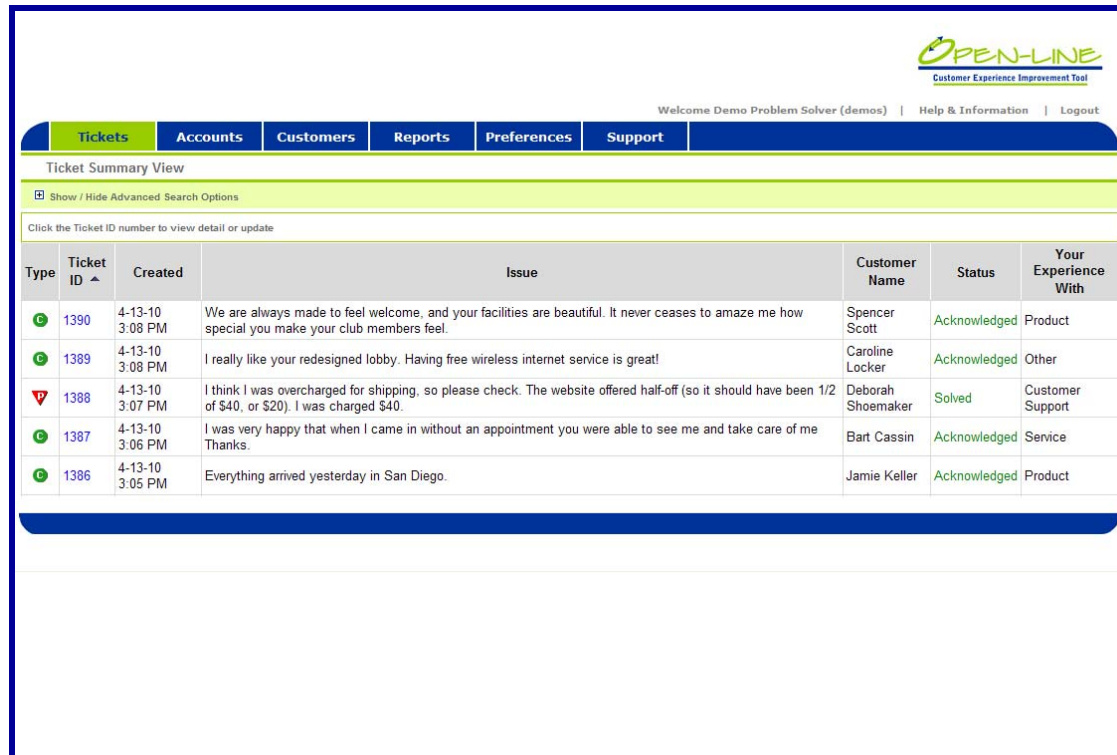
What Will Your Customers See?

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 is a navigation bar with tabs for Tickets, Accounts, Customers, Reports, Preferences, and Support. The current view is "Ticket Summary View". A search bar is present with the text "Show / Hide Advanced Search Options". Below the search bar is a table of tickets. The table has columns for Type, Ticket ID, Created, Issue, Customer Name, Status, and Your Experience With. The table contains five rows of data.

Type	Ticket ID	Created	Issue	Customer Name	Status	Your Experience With
C	1390	4-13-10 3:08 PM	We are always made to feel welcome, and your facilities are beautiful. It never ceases to amaze me how special you make your club members feel.	Spencer Scott	Acknowledged	Product
C	1389	4-13-10 3:08 PM	I really like your redesigned lobby. Having free wireless internet service is great!	Caroline Locker	Acknowledged	Other
T	1388	4-13-10 3:07 PM	I think I was overcharged for shipping, so please check. The website offered half-off (so it should have been 1/2 of \$40, or \$20). I was charged \$40.	Deborah Shoemaker	Solved	Customer Support
C	1387	4-13-10 3:06 PM	I was very happy that when I came in without an appointment you were able to see me and take care of me. Thanks.	Bart Cassin	Acknowledged	Service
C	1386	4-13-10 3:05 PM	Everything arrived yesterday in San Diego.	Jamie Keller	Acknowledged	Product

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

The screenshot displays the OPEN-LINE Customer Experience Improvement Tool interface. At the top, there is a navigation menu with tabs for Tickets, Accounts, Customers, Reports, Preferences, Admin, and Tracking. Below the menu, the user is logged in as 'Demo Administrator (demoadmin)'. The main content area shows details for Ticket Number 1390, which is currently 'Acknowledged' and is an 'Issue Type: Compliment'. The ticket details include the customer's name (Spencer Scott), account (Demo Account), and contact information. Below this, there is a section for 'Most Recent Customer Text' with a message and a 'Modified Date'. The 'Ticket Update' section contains a text area for entering update text, a 'Save' button, and several dropdown menus for updating the ticket's status (Acknowledged), due date, experience with (Product), and assigned to (Demo Problem Solver). There is also a checkbox to notify the problem solver and another to send an email to the customer.

Ticket Update			
Ticket Number: 1390		Current Status: Acknowledged	Issue Type: Compliment
Name: Spencer Scott	Account: Demo Account	Your Experience with: Product	Created Date: 04-13-2010 3:08 PM
Email: demo.account1@ibrc.com	Group: Demo Company	About That Experience: Quality	Due Date:
Phone: 800.555.0318	Display Name: Demo Company		

Most Recent Customer Text

We are always made to feel welcome, and your facilities are beautiful. It never ceases to amaze me how special you make your club members feel.

Modified Date: 04-13-2010 3:12 PM

Ticket Update

Enter Update Text:

Check to send email to customer with this update.

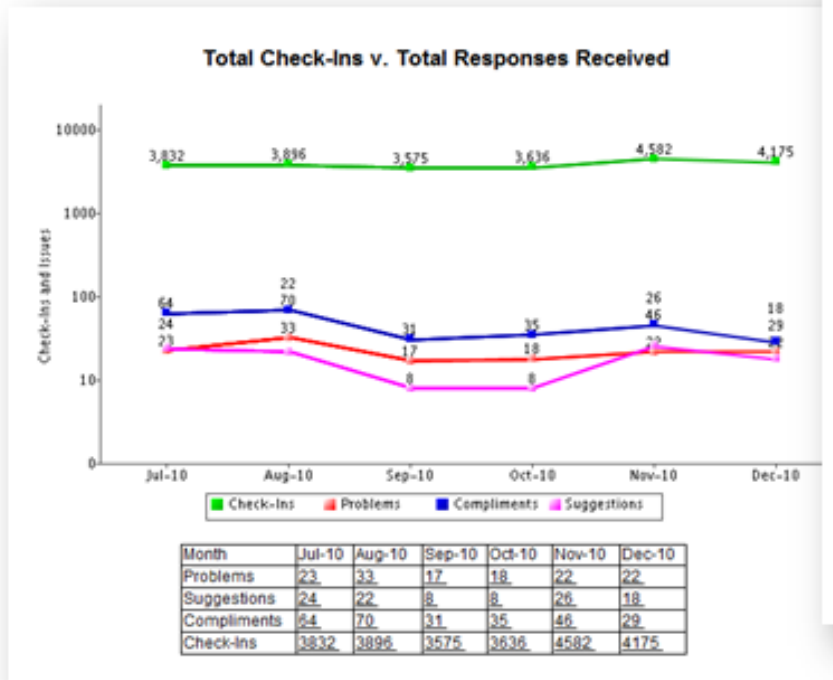
Check box to notify Problem Solver of the assigned ticket

Save

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
- 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?

- Over 100,000 Xerox customers use the system today.
- OPEN-LINE is based on a licensed and patented 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
 - 12 languages
 - Over 40,000 email check-ins each month
 - Over six years of experience
 - 99.6% up-time rating 24/7/365
 - Proven processes and functionality

Who Else Uses OPEN-LINE?

A wide variety of businesses and organizations now benefit from using OPEN-LINE, including:

- Tolosa Winery, San Luis Obispo, CA
- Mooney-Keehley, Rochester, NY
- The Willows Community School, Culver City, CA
- El Rio Little League Baseball, Oxnard, CA
- Long Term Care Services of Ventura County, Inc., Ombudsman Program, Ventura, CA
- YMCA of Southeast Ventura County, Thousand Oaks, CA

Testimonials for

"Us reaching out to them helped open up communication in a good way with people we ordinarily wouldn't hear from."

*Brittney Blete
Tasting Room/Wine Club Manager
Tolosa Winery*

"Another benefit we didn't expect, is how much, in such a short time, we are learning about our organization. In the past, we have tried to use client surveys to attempt to assess our strengths and weaknesses. Now, after experiencing OPEN-LINE, we believe it will prove to be a far better tool for assessing our organizational strengths and weaknesses than any survey we could ever create."

*Sylvia Taylor Stein
Executive Director
Long Term Care Services of Ventura County, Inc.*

"IBRC, the system developer and administrator for the program, has become our trusted partner"

*Barbara von Bergman
Manager, Customer Experience
Xerox Corporation*

"In today's economic environment, it is increasingly important to make sure that you are manufacturing the products and providing the customer service that your customers demand. OPEN-LINE provides us with real-time data and feedback to support our programs."

*Ken Hampson
President
Mooney-Keehley*

OPEN-LINE is designed to fit your budget!

Although OPEN-LINE incorporates leading-edge technologies, is highly customizable to your organization's requirements, and represents significant value ... it is refreshingly affordable.

OPEN-LINE is priced on an annual subscription basis, with initial, one-time set-up fees, if applicable.

The actual price you pay for OPEN-LINE will depend on the configuration you choose for your organization. Factors that influence price include:

- The number of customers you put on OPEN-LINE
- The number of employees you want to have access to it
- The customer-group hierarchy you determine, and
- The features and type of support you choose

Annual subscriptions can be as low as \$1 per customer.

How much is a customer worth to your organization?

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