



The Loyalty Strategy Report

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Reward Yourself!



John Maraganis

Those of us in the customer service business know how important -- and difficult -- it is to exceed customer expectations on a consistent basis. Omega understands this process better than anyone, which is why we started the NorthFace ScoreBoardSM Award five years ago to recognize companies that have reached this lofty goal.

Individuals who put forth the effort to achieve excellence in customer service deserve special consideration too. That's why we're so pleased to announce our new **CRMI Membership Rewards Program** [www.CRMIrewards.com], which allows customer service professionals to literally "reward themselves" for completing education and training programs and attending events offered through the Customer Relationship Management Institute (CRMI), Omega's education and training company.

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Balancing Workforce Optimization with World-Class Customer Service



By CJ Hauptmeier

What is workforce optimization? Ask the CFO and he'll say something like, "Increased operating income and decreased OPEX." Okay...

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Omega Launches CRMI Membership Program



CRMI. Members can review their accounts online and redeem rewards at any time.

Omega's education and training company, Customer Relationship Management Institute (CRMI), has formally launched its exciting new CRMI Membership Rewards Program. This program -- the first of its kind for a professional membership organization -- allows members to receive valuable rewards (such as savings on shopping, travel, and entertainment) based on participation in various training and education services and programs offered through



Rich Castellano

"CRMI fosters superior expertise in customer relationship management through education programs and professional development services that focus on best practices in customer satisfaction, loyalty, retention and employee motivation," says Richard J. Castellano, president of CRMI. "But in addition to offering high-quality education and training programs, we wanted to do something unprecedented for a membership organization: offer points for participation that can be redeemed for valuable rewards."

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[Reward Yourself...Continued from page 1.]

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The CRMI Membership Rewards Program offers members the best of all worlds: the ability to earn as they learn. As a result, member's organizations are better positioned to increase revenue and profits while enhancing career growth and job skills of individual and corporate members.

What is workforce optimization? Ask the CFO and he'll say something like, "Increased operating income and decreased OPEX." Okay...

Those of us in the customer service business know how important -- and difficult -- it is to exceed customer expectations on a consistent basis. Omega understands this process better than anyone, which is why we started the NorthFace ScoreBoardSM Award five years ago to recognize companies that have reached this lofty goal.

But we feel that the individuals who put forth the effort to achieve excellence in customer service deserve special consideration too. That's why we're so pleased to announce our new CRMI Membership Rewards Program, which allows customer service professionals to literally "reward themselves" for completing education and training programs and attending events offered through the Customer Relationship Management Institute (CRMI), Omega's education and training company.

By becoming a member of CRMI, you earn points that can be redeemed for a host of travel-related, dining and entertainment services while improving your customer satisfaction skills and career advancement potential. The rewards are a great way to save money and have fun, or members can share their

redeemed rewards with a valued employee or important client.

As a member, you accumulate points as you take part in various CRMI and partner events, such as seminars, webinars, annual SCORE Conference and, coming soon, CRMI Services (e.g., Speakers Bureau, customer appreciation events). We even start you off with points as soon as you become a member -- 1,000 points for a one-year membership and 5,000 points for a three-year membership. You also receive points for referring someone who becomes a member. Members can track their account balances and redeem rewards online anytime.

Call (877) 839-8761 toll free or [click here](#) to learn more about the CRMI Membership Rewards Program. If you interact with customers or employees on a professional level, this is where you belong!



While the CRMI Membership Rewards Program is big news, it's not the only exciting new development here at Omega. We have added three executive-level customer care professionals to our Center for Loyalty Research and Anthony & Alexander consulting group: Curtis Bingham, executive director of customer loyalty management strategies; Bob Brooks, executive director of lean six sigma customer services; and Christopher Stanvick, director of benchmarking. Each of these experts will also have their own columns in *The Loyalty Strategy Report*, beginning with this issue.

We've also made some important organizational changes within our GoldMine TeleServices group to improve sales productivity. Read more about these exciting changes in the Omega Update section of this newsletter.

Our featured customer case history is Haemonetics Corp., one of only five companies to have won the NorthFace ScoreBoard Award five times. Regular columns from Omega business partners Incentive Logic and Rainmaker Systems add further insight into such key areas as incentive programs and workforce optimization.

On behalf of everyone at the Omega companies, I hope you're enjoying the summer season. Watch for the next edition of *The Loyalty Strategy Report* in the fall.

Sincerely,

A handwritten signature in black ink, which reads "John Alexander Marragins". Below the signature, the text "John Alexander Marragins, President & CEO" is printed in a smaller font.

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"Customer perceptions of a company are based on experiences at every point of contact, not just one area," Castellano says. "So it's vital that a company takes a wide angle view and considers the quality of product, services and support devoted to every touch point."

The CRMI Membership Program is a valuable resource to professionals involved in any area of the full spectrum of customer and employee contact, including:

- **Customer Service Call Center Operations**
- **Field Service Help Desk**
- **Technical Support Sales & Marketing**
- **Human Resources Professional Services**
- **Quality Management**

CRMI members can take advantage of the following programs and services, and in most cases earn points that can be redeemed for valuable merchandise and other benefits.

- **Education**
- **Center for Loyalty Research**
- **Loyalty Strategy Report**
- **Seminars/Webinars**
- **Annual SCORE Conference**
- **Employee surveys and incentive programs**
- **Certification Programs**
- **Research and intelligence services**

Author's note:

C.J. Hauptmeier is general manager, strategic lead generation, for Sunset Direct, Inc. -- A Rainmaker Company. He is responsible for the overall direction and operations of the Rainmaker Strategic Lead Generation business unit as well as defining new products and services for both service sales and lead generation.



Ask the COO and she'll say something to the effect of, "Increased number of frictionless closes with less abandonment and lower time to complete." Yep...

Ask the CIO and he'll say, "Enabling our legacy apps through open source middleware and web services will improve integration with collaboration tools as well as improve the throughput and eliminate latency caused by the indexing issues inherent with our fat client architecture..." Wow!

Ask the CEO: "Workforce optimization will allow our company to compete in the global marketplace and create an opportunity whereby thought leadership can take the company forward into new areas of synergistic alignment thereby increasing shareholder value ..." What?

Is there anyone else we should ask? Oh yeah, what about the workforce? The people who do the "real work" will tell you that workforce optimization is not possible without workforce motivation. What this means to you is that you need to hire talented people and teach and motivate them to take care of each customer or prospect interaction in a way that creates and/or adds value. Lead them through the disciplines of process optimization, always keeping an eye on creating career contact center professionals complete with a career path for the leaders. Dumb down the process with technology and smarten up the people with training and incentives. Too often, companies believe they can simplify complex processes with technology and then cut their "high-paid" contact center staff or outsource them for BFE (better fiscal efficiencies).

Customer service is not a science, although science can make it better. Mixing colors and stroking the canvas requires artists who need to be attracted to what they are creating – customers and prospects who view your organization as something special in the marketplace. So, turn the org chart upside down and look through the organization to the customer and enable these artists to express themselves and create masterpieces. They will help build an organization that leads its respective industry through profitability and products that rule.

The CEO's vision can only exist by having a platform high enough and stable enough to see over the clouds. Meaningful customer/prospect interactions build this platform. Customers and prospects need what they need when they need it, and no amount of process optimization and automation matters without a skilled and motivated workforce. Take care of those who take care of the customers. The customers are the business. Put the processes and technology in place to make them more efficient (employees and customers) -- and track it. Put the right kind of training and leadership in place to make them more effective (employees and customers) – and track it. Generate profits and share the spoils with those who contribute most (yes, employees and customers) – and yes, track it. Now you're catching on. Stay tuned...

Customer Profile: Haemonetics Corp.

Haemonetics ranks among the 200 best small companies according to *Forbes Magazine*, and has used Omega for customer loyalty management strategy planning and implementation since 1998. Specific services used have included:

- Customer and employee surveys
- Competitive benchmark studies
- Key Account retention strategies
- Win-back strategies
- Marketing of results

"We wanted to tap what we call the 'Voice of the Customer' and use that feedback and information to drive continuous improvement in our customer interactions," said Craig Bolger, director of North American Field Service & Product Support at Haemonetics. "This



Craig Bolger

is the primary goal of the Omega Customer Satisfaction program at Haemonetics. "We determined at the very beginning that we wanted to measure satisfaction at multiple key 'touch points in the customer relationship instead of just one particular area, such as call centers or technical support," Bolger says.

"As a result, we've run multiple campaigns to measure customer satisfaction in sales, field service, customer service, training and shipping & receiving. The cost of not measuring customer touch points far surpasses the cost to implement a professional loyalty management program."

The results have been extraordinary. Haemonetics has won Omega's prestigious NorthFace ScoreBoardSM Award for five consecutive years, one of only five companies in the world to have achieved this level of verified customer service excellence.

For example, **Figure 1** shows the exceptional satisfaction ratings the company has earned in field service support, customer service support, clinical & technical hotline support and customer training according to responses to Omega surveys.

Customer Satisfaction Pays Off

While the Omega research has shown how satisfied Haemonetics customers are with the service and support they receive, Haemonetics has leveraged this powerful information in its sales and marketing program. "Competitive conversions are a reality in our industry, and the Omega survey results are one tool we use to represent the overall value that Haemonetics delivers to our customers," Bolger says.

In every single competitive conversion negotiation, retention model or growth model, Haemonetics make a point to include its Omega customer satisfaction data, device quality (failure rate) and response time data.

"This data plays a significant role in terms of ROI," Bolger says. "In just one recent fiscal quarter, this information helped prevent a significant customer from jumping to our competition, and helped us convert a \$100,000 annual account from the same competitor. And to top it off, we received a \$30 million conversion in the plasma industry -- with the key driver being the level of service we deliver."

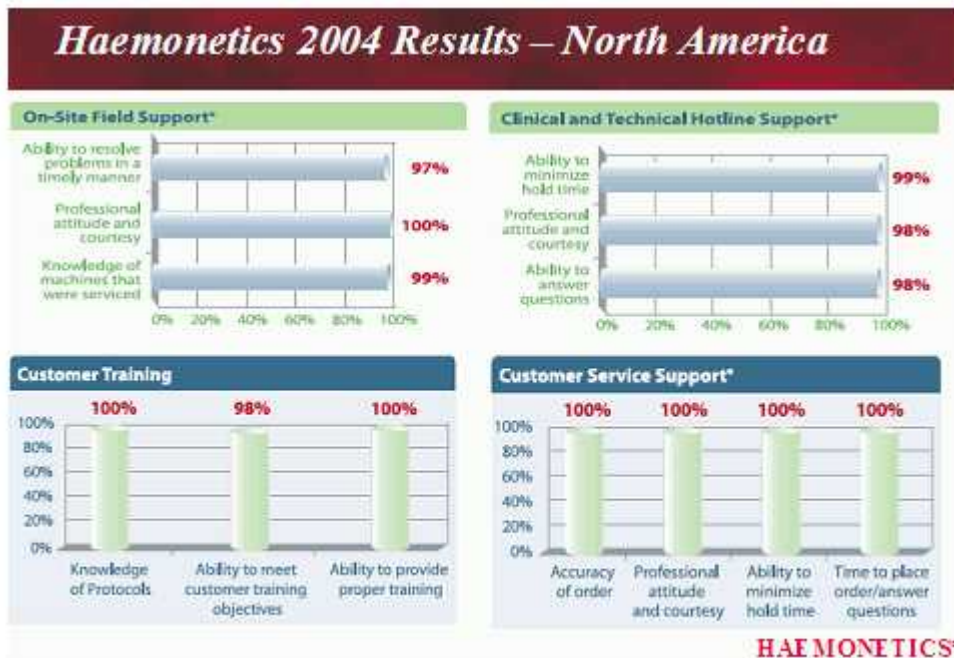


Figure 1.

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Loyal Employees Mean Loyal Customers

Haemonetics recognizes the importance of employee participation and rewards in the customer satisfaction process. "We involve employees at all levels of the service delivery chain in our satisfaction program," Bolger says. "They know they are always being measured, and will be rewarded for helping the company meet its demanding customer satisfaction goals."

Bolger says that survey results are located in the lobby of its headquarters building, and are cited in sales presentations, service contracts, on the corporate website and other external communications.

"Since the employees are on the front lines with customers, we want to tap them for ideas to make things even better," Bolger says. "Each member of the team writes three improvement suggestions on post-it notes, which are collected and placed under each survey question. This helps us to develop best practices and empowers our employees to execute effectively."

Looking ahead, Bolger says Haemonetics plans to measure individual performance versus group ratings as another way to link customer satisfaction with employee compensation. A competitive benchmark survey is in the works that will identify how the company compares with its peers and where improvement may be needed.

"After all," Bolger says, "customer satisfaction will always be our most vital business metric. "We can't stand still if we expect to win the NorthFace Award for the sixth consecutive year!"

HAEMONETICS

Haemonetics (NYSE: HAE) is a global company engaged in the design, manufacture and worldwide marketing of automated blood processing systems. These systems address important medical markets: surgical blood salvage, blood component collection, plasma collection, and blood component safety. The company is headquartered in Braintree, Mass., has 1600 employees worldwide and recorded sales of \$383 million in fiscal year 2005.

Lean Six Sigma for Customer Service



Bob Brooks

What is Lean? What is Six Sigma? And what do manufacturing tools have to do with customer service? Let's start with Six Sigma. It's a process improvement methodology whose name comes from its goal of improving quality to the point that customers experience only 3.4 defects per million opportunities.

An opportunity occurs every time a customer comes in contact with your process. This includes placing orders, contacting your call center with questions, receiving service calls, billing, etc. Defects could include orders being filled incorrectly, a service call failing to solve a problem, service personnel being perceived as being unprofessional or unresponsive, or it could take too long to answer the phone or respond to an email.

The key is that a process is a process. While providing a service involves different steps and a different array of potential defects than manufacturing, it's still a process. This means that the same tools can be adapted to manage it.

Lean is a paternal twin to Six Sigma. It's a process improvement methodology that focuses primarily on cycle time rather than defect reduction. It's extremely valuable for three reasons. First, virtually every customer has needs relating to reliable delivery (of either a product or service). Second, most have a need for quick delivery or "responsiveness". Finally, the way lean reduces cycle time also reduces defects. Lean Six Sigma integrates the tools from both methodologies to provide a systematic and robust approach to process improvement. Clearly, the better your processes can operate, the better job you can do satisfying customers and growing sales.

Lean and Six Sigma in service organizations are no longer marginal, risky, or cutting edge approaches. They have become main stream best practices. Research and experience have shown that they provide *even better* results in service than manufacturing environments. GE capital led the way with its Six Sigma program several years ago. They saved over \$300 million in their first three years and substantially improved customer satisfaction and sales. Citicorp, Chase, Bank of America and many other financial service companies have followed suit with similar results. Marsh and McClennan, AIG, and several other insurance organizations have used Lean Six Sigma programs as have real estate management, healthcare, call center, order fulfillment and other service organizations.

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The rule of thumb is that, by applying Lean Six Sigma methods, you can reduce the cycle time of the average process by about 50% and defects by 20% to 50%. Just imagine the impact this could have on customer satisfaction, customer retention, and sales to new customers!

Author's note:

Bob Brooks is executive director of lean six sigma customer services at Omega. He is a recognized authority in organizational process improvement practices, and has extensive experience in integrating IT infrastructures and ERP applications into process improvement efforts.

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WWW.OMEGASCOREBOARD.COM**

**VISIT CRMI'S NEW WEB SITE
at:
WWW.CRMIREWARDS.COM**



Using Incentives to Create the "Right" Results



Roger Hackett

In the unceasing quest for boosting profits, today's company must be creative and innovative while striving to reach customers. "Plain-vanilla" marketing and advertising may suffice for generating and maintaining awareness. However, companies must put forth increased effort in lev-

eraging one-to-one personalized initiatives to solidify customer acquisition, performance and retention. Thanks to the Internet, incentive programs have become more realistic for companies of all sizes. The Internet allows companies to interact with their audience through progressive rewarding via commonly used technologies.

When outsourced to experienced professionals, these programs boast rapid deployment, low-cost entry and ease of maintenance. "Companies throughout the world can now quickly introduce and manage numerous incentive programs by seamlessly integrating a comprehensive outsourced solution and supporting services into their framework," said Roger Hackett, CEO of Incentive Logic, Inc., a leading incentive solutions provider.

The results derived from an operationally proven, customized loyalty program are attractive to businesses with specific revenue, profit or sales goals. The personalized aspect of recognition combined with the receipt of a reward creates a compelling experience for customers.

This experience can make a significant impact on company identity, brand perception and product loyalty. These programs reward customers for a desired behavior and for the achievement of a predetermined goal. The ability to encourage or modify behavior can have dramatic effects. Companies with such programs report significant increases in sales and brand awareness.



Incentive Logic works to garner an in-depth knowledge of the processes that drive its clients' businesses as well as the markets in which they operate to ensure each loyalty program achieves maximum effectiveness. For more information on technology and services offered by Incentive Logic, please visit www.incentivelogic.com.

Chief Customer Officer Corner

The New Silver Bullet for Growth & Customer Loyalty



Curtis N. Bingham

If you want to grow your business while simultaneously increasing customer loyalty, The Chief Customer Officer (CCO) might just be the silver bullet you are looking for. At the 2005 SCORE conference we introduced the CCO role and its responsibilities and described how this role has been the silver bullet in many ways for companies such as Sun, Cisco, HP, webMethods, and others.

The Chief Customer Officer or similarly titled role assumes executive-level **accountability** for customer relationships, much like a COO is accountable for operations and the VP of sales for revenue growth. This role can help your company do the following:

1. Grow revenue
2. Increase customer profitability
3. Increase customer loyalty & retention
4. Develop sustainable competitive advantage
5. Decrease costs

Grow Revenue

The CCO can help grow revenue from existing customers as they drive repurchase (e.g., service contracts) and by identifying cross-sell and up-sell opportunities. By establishing customer value metrics, the CCO can identify the most valuable customers and help marketing & sales find more prospects just like them.

To grow, a company must not only actively strive to retain customers and maximize profitability, but it must also continuously identify who its best customers are and find more customers like them. The CCO, with broad insight into both the existing customer base and the marketplace, can identify and help acquire the most desirable new customers and prospects.

The CCO can also balance marketing and sales strategies so that new customers are not acquired at the expense of existing customers.

Increase Customer Profitability

Companies must know which customers are most valuable and deserve the greatest attention and service. With a CCO's breadth of customer insight, he/she can create customer value metrics and help prioritize scarce resources to profitably nurture the most valuable customers.

Increase Customer Loyalty & Retention

Frederick Reicheld of Bain & Company said, "A 5% increase in customer retention rates increases profits by 25-95%." The Chief Customer Officer is in a unique position to ensure that the most valuable customers are not only retained -- but converted into loyal customers -- who will not just use but actively promote your products and services.

Because of the CCO's regular interaction with customers, consistent "health measurements," and early warning mechanisms, this indispensable officer is uniquely capable of identifying customer dissatisfaction and potential for defection. Once these problems are identified, the CCO helps the organization fix them and make certain they never happen again.

Ted Uczen, CCO of NuEdge Systems (now a part of Meta-vante Corp.) is enjoying a 90% customer retention rate due to his ability to leverage customer feedback to discover and influence strategic product shifts his customers were demanding.

Develop Sustainable Competitive Advantage

In this age of hyper-competitiveness where any feature or service-based differentiator is easily duplicated, the only truly sustainable competitive advantage is in-depth customer understanding. To succeed, you must know your customers better perhaps than they even know themselves. This customer insight must be gathered from every possible channel. Under the direction of the CCO, companies that make it actionable and drive customer-centric change throughout the organization will be successful.

Garland Hall, former CCO of webMethods, helps instill strong customer focus throughout the company by bringing customers in to visit with executives, developers, and even non-customer-facing employees so everyone can hear customer success stories and learn of customer "pain points."

Decrease Costs

The CCO, by virtue of his/her position and breadth of involvement with current customers and the marketplace, is uniquely positioned to determine levels of support and attention given to customers according to customer value metrics. The CCO also can settle disputes surrounding resource allocation and set priorities for product/service development. As a result, decisions and priorities will more likely maximize customer value to the company.

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Measuring Customer Satisfaction and Loyalty



Christopher Stanvick

In today's competitive marketplace, companies must not only keep their customers satisfied but also drive customer behavior to build and maintain long-term loyalty. Omega's research over the years confirms there is a clear distinction between achieving customer satisfaction and achieving customer loyalty. After all, it is relatively easy for a company to

get high satisfaction scores from customers, but this doesn't necessarily translate to high loyalty and profitability.

Though satisfaction measures provide critical information, it is important to note that measuring customer satisfaction is not the same as measuring attitudes/perceptions related to loyalty. Satisfaction is a necessary but not sufficient component of loyalty. Loyalty can be affected by brand reputation/image, perceptions of how a complaint was handled, customer perceptions, emerging preferences, perceptions of competitive pricing, the cumulative impact of all past experiences with the brand, and many other factors. Loyalty is relationship based, compared to a transaction-based metric like satisfaction. This is one reason it typically is not measured as often as customer satisfaction.

Using transaction-based customer satisfaction tracking as the sole customer input to increase loyalty -- but not actually conducting loyalty research -- is like driving a car by only looking at the speedometer. The speedometer will tell you important information about how fast your car is moving -- critically important information -- but staying on the road is another matter.

So what exactly do satisfaction and loyalty measure?

-Customer satisfaction is essentially a measure of a customer's superficial feelings about company image, product availability or quality, sales process, product performance or a service. A customer could feel very satisfied with a product or service yet behave disloyally. The metric that is tied to behavior is customer loyalty.

-Customer loyalty is the measure of attitudes and behaviors that directly affect the total perceived relationship value -- not merely a single element such as customer service quality, price, accuracy, technical proficiency, completeness, brand image, etc.

This basic framework plus the need for measuring and making improvements to customer-facing measures lead to the following questions: What will be the most effective approach to influencing the overall measures? and What are the key drivers of customer satisfaction and loyalty?

These questions can be addressed in either of two ways. You can ask the respondent to indicate the importance of each factor, or you can statistically derive the importance or influence each factor has on the customer's satisfaction and loyalty.

Depending on the length of the survey instrument, including questions that directly measure the importance of issues can provide meaningful, actionable information, particularly on an individual customer basis (i.e., when small sample sizes prohibit statistical analysis). There are analysis techniques, however, that accurately determine the "impact" of a measure on an overall issue. The use of statistical techniques to derive the impact allows for the elimination of the importance questions in the survey, permitting either the addition of other critical issues to be measured or allowing for a shorter interview.

An effective customer satisfaction/loyalty management program must provide research that is focused on identification of appropriate issues in a way that can be benchmarked.

The payoff for maximizing the value of both your satisfaction and loyalty measurements rests in their power to guide the tactical and strategic actions of your brand.

Measuring loyalty is not just a matter of adding a couple of "loyalty" questions to an existing customer satisfaction survey. Differences between loyalty and satisfaction exist in the questions asked, who is asked, how many people need to be surveyed, when they need to be surveyed, and the type of analysis required to produce actionable information.

Christopher Stanvick is director of benchmarking within Omega's Center for Loyalty Research. His primary responsibility is to further enhance Omega's market research offerings in partnership with the company's loyalty management strategy services teams.

Omega Update Senior-Level Appointments

Omega welcomes three industry-leading consultants to its Center for Loyalty Research, which develops customer satisfaction and loyalty metrics that are used to drive effective management action.

Curtis N. Bingham, executive director of customer loyalty management strategies; **Bob Brooks**, executive director of lean six sigma customer services, and **Christopher Stanvick**, director of benchmarking, will also support Omega's Anthony & Alexander consulting and professional services organization.

Curtis N. Bingham has helped many companies establish executive-level customer accountability, often through the creation of successful chief customer officers (CCO). He has been an interim CCO himself for two companies and, for the last three years, has published the annual *Executive-Level Customer Champions* report. This report covers companies such as Cisco, HP, Sun, Monster.com, and Disney that includes the roles, responsibilities, and best practices of CCOs around the world. He is the author of the forthcoming book, *The Hottest New Title in the Executive Suite: The CCO*.

Bob Brooks brings 30 years of consulting experience to Omega. He has worked within service, manufacturing, health care, and supply chain settings addressing issues of profitability, productivity, organization change, quality, and strategic planning. Over the past ten years, he has focused extensively on helping organizations implement process improvement programs, including TQM, six sigma, lean, and kaizen events.

Chris Stanvick was most recently director of marketing for The Faneuil Group, where he had overall responsibility for U.S. and Canadian communications. Prior to joining Faneuil, Stanvick served as vendor selection and relationship manager in charge of outsourcing and assessment services for Kowal Associates. In this role, Stanvick joined a group of senior-level consultants who designed, created and implemented customer relationship management (CRM), teleservices and training solutions for Fortune 500 clients. Stanvick also acted as the interim program manager for client Philip Morris, USA, managing daily outsourced customer service operations.

Promotions in GoldMine TeleServices Group

Omega's outbound calling organization, GoldMine TeleServices Group, has promoted **Susan Reardon**, to director of telecenter contact operations (TELCO), and **Renee Lane** to regional sales manager. Both have been with company for more than seven years. The TELCO unit will include Omega's CARE telephone survey activities and the GoldMine group activities. Combining these two groups under Susan's leadership will lead the way for the implementation of new TELCO software, which will provide both telephone survey and telemarketing technology. Susan also is responsible for lead generation for the annual SCORE Conferences and will continue her efforts with our client TOPS and ROAR programs to improve the performance of those programs for our clients.

Susan joined Omega in 1996, bringing with her 15 years experience at Wang that included three years experience in telemarketing and three years in a supervisory role. As telecenter supervisor and manager for the past six years, Susan has been instrumental in increasing the quantity of surveys completed while at the same time ensuring high quality.

Renee will be responsible for all the sales activities related to the GoldMine TeleServices Group. She will focus on selling TOPS (telemarketing and lead generation) and ROAR (telesales, contract renewal) programs within North America. Further, she will be the sole focus on the sale of Omega's SMART services to the CRM community.

Renee joined Omega Group in 1998 from a local telemarketing firm. She has a strong background in the telesales industry, holding senior inside sales positions for several years prior to joining Omega.

[Chief Customer Officer continued from page 7.]

Conclusion

In conclusion, your company can reap multiple benefits by establishing the role of Chief Customer Officer. You will be able to maximize the profitability of current and future customers; increase customer loyalty and retention, and ensure long-term success as you develop the in-depth insight into what customers need, want, and are willing to pay for. Incorporating the CCO function leads to longer and more profitable relationships with key customers, which in turn leads to achieving the ultimate goal of increased and more profitable revenues.

Curtis N. Bingham is executive director of customer loyalty management strategies at Omega. He has extensive experience in helping companies increase revenues by developing an in-depth understanding of customers' needs, wants and, most especially, what they are willing to pay for.



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