



Customer Satisfaction Index – CSI Manual

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1. Description

For a company to thrive, it is vital to cover its customers’ needs and desires. For that to be achieved, it is necessary to know if the products and services it provides keep its customers satisfied.

That is why, QIVOS CLOUD platform provides the Customer Satisfaction Index, which is a group of questions that are sent to the customers, via SMS or email, after every purchase, so that they can rate their whole experience. After every transaction, the customers receive a message, via SMS or email, with a link that leads them to the Invoice CSI form. This message is multilingual and contains the brand’s logo and colors. Finally, it has to be pointed out that the above mentioned link can be used only once and is designed to expire after 14 days of the transaction.

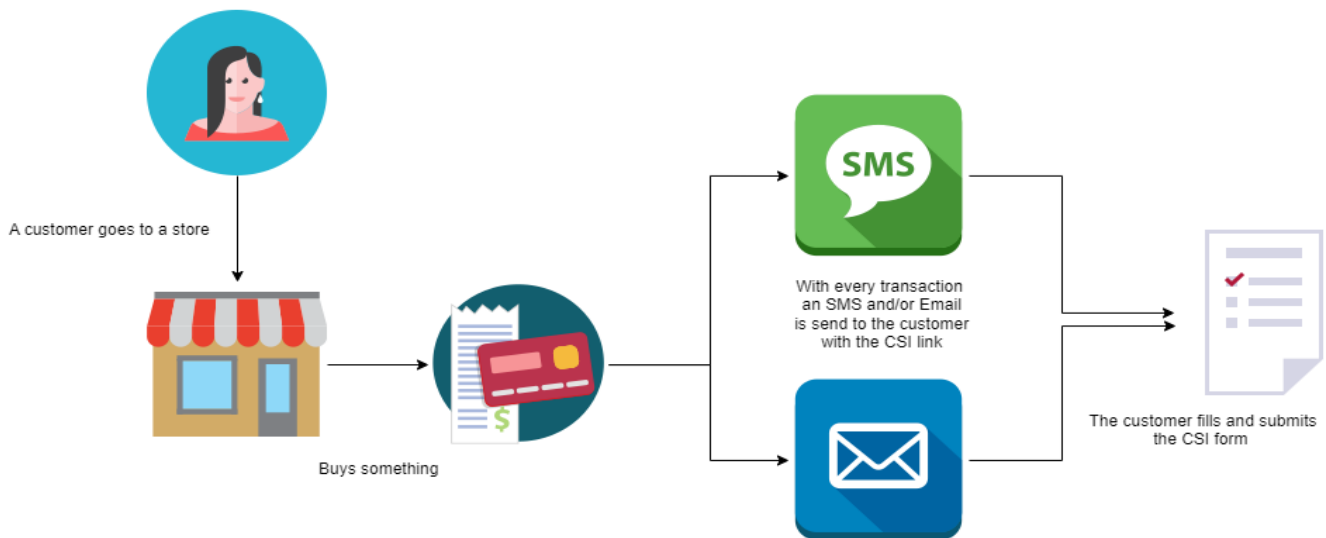


Figure 1.1.1: Customer Satisfaction Index flow

The CSI form is mainly composed of 3 questions whose value is measured in a range from 1 to 5. These questions focus on:

- The quality of customer service
- The quality of the purchased product or the provided service
- Whether the product purchased or the service provided were value for money or not

Both their form and weight can be customized.

When a customer answers the CSI form, the QC platform calculates the CSI score, which is then used to create useful diagrams in the respective Unified Customer Profile and in the Insights tab. Apart from that, a customer's CSI score could be used in campaign segmentation.

There is, also, the option to add a fourth question which collects data regarding the Net Promoter Score (i.e., the possibility of customers to recommend the store to their friends). Its value is measured based on a scale from 0 to 10 and it is presented on Insights as a general score.

2. Step – by – step guide

For the CSI form to be sent to the customer the following steps must be followed.

2.1. Select the questions

After going to the CSI module in the QIVOS CLOUD platform, the user has to select the questions and determine their weights. A possible way to do so, is described below:

- a. Customer Service: 30%
- b. Product/Service: 30%
- c. Value for Money: 40%

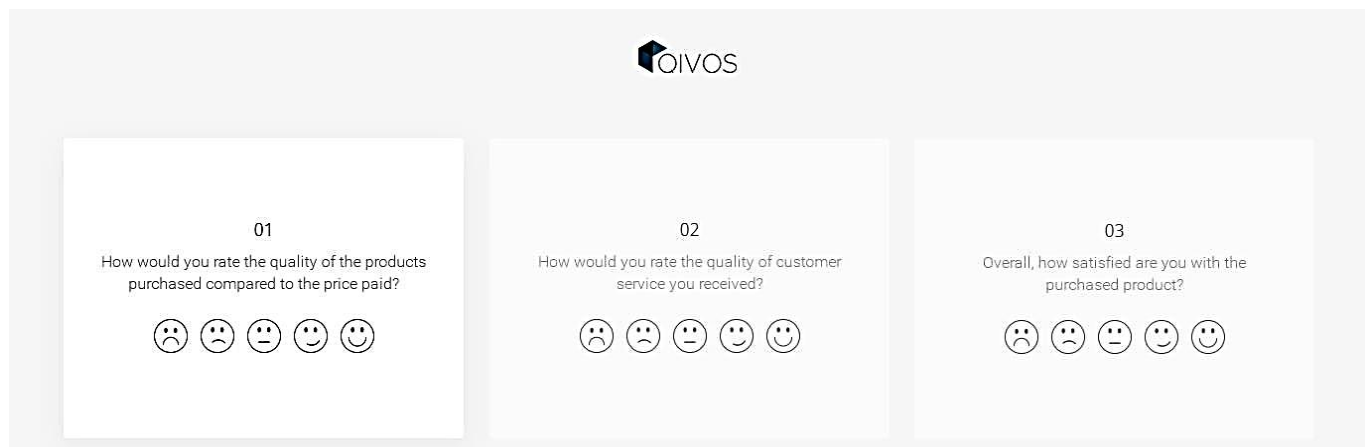


Figure 2.1.1: CSI questions

As it can be clearly seen, the answers are measured in a range from 1 to 5

2.2. Create a CSI form template

The user has to create the template (UI – UX) that the CSI form will use. In case there are more than one brand available, a store name has to be added. For example, the CSI form's template of QIVOS is shown in the image below:



Figure 2.3.1: QIVOS's template for the CSI form

2.3. Select the 4th question (optional step)

If the user wants to, a fourth question that can be added that, as stated above, focuses on the Net Promoter Score (i.e., the possibility of the customers to recommend the store to their friends). Its value is measured based on a scale from 1 to 10 and it is presented on Insights as a general score.

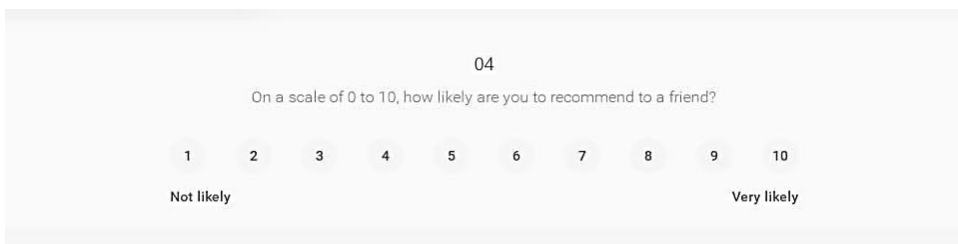


Figure 2.3.2: NPS question

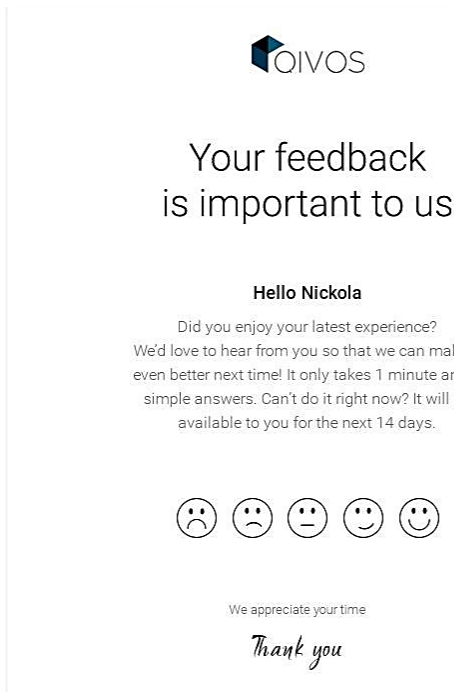
2.4. Select the communication channel

The user has to select either one or both of the communication channels. The available options are:

- a. Email
- b. SMS

If the option “Email” is chosen, the user has to create an Email template (UI – UX) and select the “email opt-in flag” for the customers, so that only the ones that have agreed on receiving emails will be targeted.

An example of the Email the customers will receive are:



Figures 2.4.1: Example of Email templates

Otherwise, if the option “SMS” is chosen, the user has to define the context of the SMS that will be sent and select the “SMS opt-in flag” for the customers, so that only the ones that have agreed on receiving SMSs will be targeted. An example of the SMS that the customers will receive is:

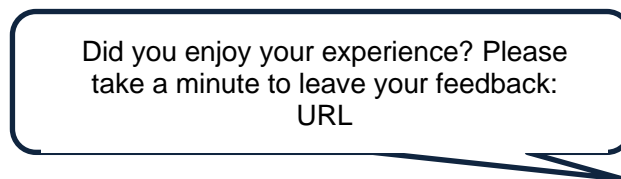


Figure 2.4.3: Example of the SMS that will be sent

2.5. Set up the Invoice CSI flow

For the CSI form to be sent, the Invoice CSI flow has to be triggered. At present, the Project Manager or the IT developer is responsible to complete this action.

3. Graphs in the QC

When customers answer the CSI form, the QC platform calculates their CSI score using the formula below:

$$\text{CSI score} = ((1^{\text{st}} \text{ Question's weight} * \text{answer 1}) + (2^{\text{nd}} \text{ Question's weight} * \text{answer 2}) + (3^{\text{rd}} \text{ Question's weight} * \text{answer 3})) * 20$$

For example, the CSI score of the customer presented in the table below is 50%

QUESTION	WEIGHT	ANSWER	PRODUCT
Customer Service	30%	5	1,5
Product / Service	30%	2	0,6

Value for money	40%	1	0,4
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The maximum score a customer can have is 100%.

The customers' CSI scores will be used to form useful diagrams in each customer's Unified Customer Profile and in the Insights.

Unified Customer Profile:

In the Unified Customer Profile, there will be a timeline graph with this customer's CSI score per invoice. There will, also, be an average CSI score on this diagram.

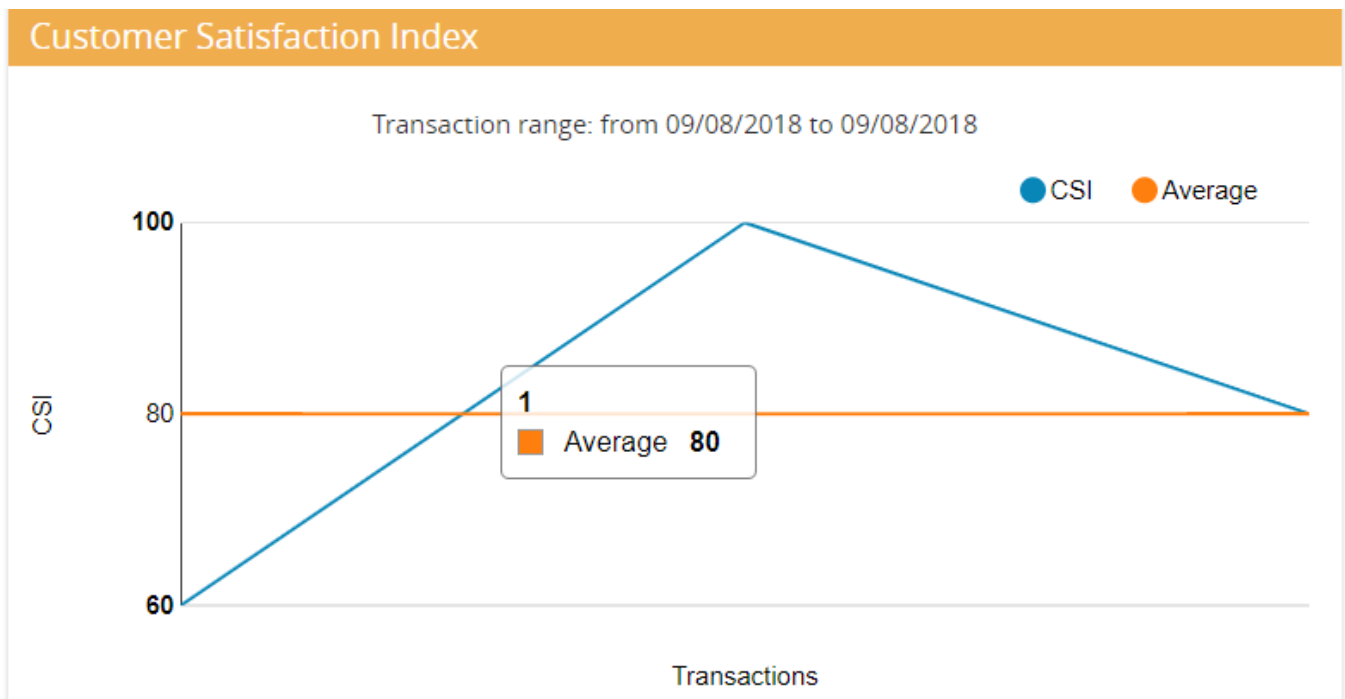


Figure 3.1: CSI diagram in Unified Customer Profile

Insights:

A new time graph will be visible on the transaction tab on Insights, that contains the Average CSI score per month, for the last 12 or 24 months. This may be modified per store and schema.

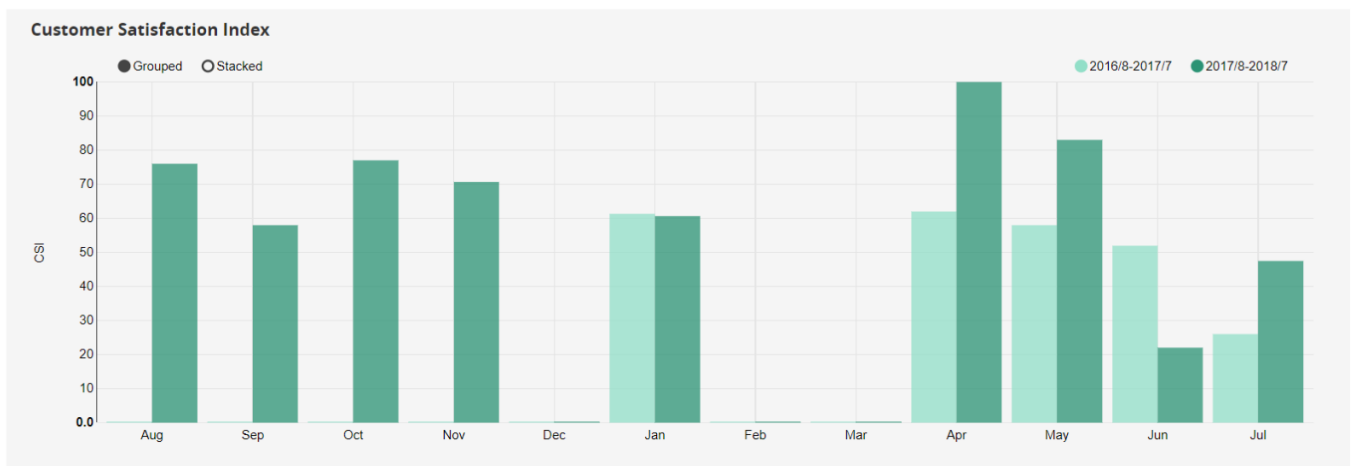


Figure 3.2: CSI diagram in Insights