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Fostering Long-Term Customer Relationships by enhancing Customer Experience

A Case Study at Consultancy Inc.

Master's Thesis in the Supply Chain Management Master's Programme

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Abstract

In today's competitive business environment, the importance of fostering long-term customer relationships through enhanced Customer Experience (CX) has become vital. This study explores the important need to improve CX practices to build lasting customer relationships. The study focuses on a case study at Consultancy Inc., a leading consulting firm founded in 2000, to address the urgent need to improve customer relationships through a refined CX strategy.

The research at Consultancy Inc. was motivated by the recognition of the evolving customer landscape and the increasing emphasis on CX as a key differentiator in the consultancy sector. The study aimed to analyze Consultancy Inc.'s current CX and Customer Relationship Management (CRM) practices to identify areas for improvement and propose tailored strategies for enhancing CX. By focusing on research questions related to customer relationship assessment, factors influencing customer experience, and strategies for developing long-lasting customer relationships, the study aimed to offer practical insights for Consultancy Inc. to drive sustainable growth.

By examining Consultancy Inc.'s customer-centric approach, the study identified gaps in communication strategies, feedback mechanisms, and personalized customer interactions that were preventing the development of strong customer relationships. The findings highlighted the importance of implementing advanced metrics and tools to evaluate the effectiveness of CX initiatives and CRM mechanisms. By aligning theoretical frameworks with empirical data, the study recommended a strategic shift towards proactive customer engagement, personalized experiences, and continuous improvement in CX strategies to enhance customer satisfaction.

The study's recommendations highlight the transformative potential of tailored communication strategies, real-time feedback mechanisms, and personalized customer experiences in fostering long-term relationships and driving business performance. By integrating CX practices with CRM strategies, Consultancy Inc. can create engaging customer experiences that meet customers' changing needs and preferences, positioning the firm for lasting success in the dynamic consulting sector.

Keywords: Customer Experience, Customer Experience Management, Customer Relationship Management, CXM metrics and tools, consulting sector

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1. Introduction

In this chapter, the study's background is presented, motivating the relevance of the focused problem and the relevance for the focal firm, Consultancy Inc. This is followed by a presentation of the aim, scope and delimitations.

Goldberg (2023) states that customer relationship management (henceforth referred to as CRM) approaches have become more widely adopted by companies to establish strong relationships with customers and to improve revenue by using customer information and feedback. Research has shown that efforts in improving customer experience (henceforth referred to as CX) make companies better at managing and developing their customer relationships.

“Customer experience is emerging as the new-age differentiator. There has been a paradigm shift of focus from developing product brand to building customer relationships to creating and delivering engaging and compelling customer experiences” (Bhandari, 2016, p.76).

CX has gained attention from both academics and practitioners. Grønholdt et al. (2014) even state that it is one of, if not the most important parts of achieving success for businesses regardless of what industry they operate in. Lemon and Verhoef (2016) argue that businesses can enjoy potential benefits if they manage to develop their CX capabilities. As the popularity of customer experience management (henceforth referred to as CXM) increased, CX developed into a key strategic priority for businesses and research as it has the potential to increase revenue and business performance if utilized to its fullest potential (Waqas et al., 2020).

Furthermore, several global executive-level managers expect CX to become one of the greatest avenues for growth moving forward. However, Bough et al. (2023) argues that even though CX has the potential to become a driver for growth, there are many factors and variables that must be considered when choosing CX strategy. Thus, companies must prioritize factors that enable sustainable longevity and high customer satisfaction.

This thesis aims to provide a deeper understanding of Consultancy Inc.'s current CX and CRM and to provide suggestions of how to improve them through applying a tailored analytical framework to their context. Consequently, this thesis focuses on CX in the consultancy sector.

1.1 Background

This thesis deals with how the consulting company, Consultancy Inc. can improve its CRM by working with CX. The company was founded in 2000 and has since positioned itself as a prominent actor in the global consulting landscape with offices in a wide range of countries. The company specializes in providing technological and R&D consulting services to its customers. Furthermore, their services stretch across multiple industries such as Life Sciences, Software, Industrial Automation, Data science, and Supply Chain Management.

Consultancy Inc. aims to align the expertise and interests of their consultants with the expectations of their customers. Consultancy Inc. applies a consultant-driven approach which places a lot of responsibility on their consultants, something they believe contributes to their consultants' professional development as well as to organizational growth. Examples of this kind of responsibility are how consultants are expected and incentivized to act as the bridge between the company and its customers and thereby playing a key role in the development of the relationships between Consultancy Inc. and their customers. By adopting a consultant-driven approach, the company can ensure that they add value to their customers while simultaneously offering their consultants the necessary tools and prerequisites for continuous professional development. On a strategic level, this alignment of consultant expertise and customer demand lays the foundation for the company's capability to deliver impactful consulting services to their customers.

The consultants are assigned to projects that are mainly client-site based, meaning that it is essential that Consultancy Inc. develops and nourishes their customer relationships. As the development of customer relationships is crucial to Consultancy Inc.'s success in the long run, the company has developed a systematic process for collecting and analyzing data about customer relationships and customer experience.

This process includes using Net Promoter Score (NPS) to gather and analyze customer feedback. Despite an already implemented process, Consultancy Inc. recognizes potential benefits to evaluating their current state and adopted approach.

This master thesis is conducted on behalf of Consultancy Inc. as a proactive measure to identify crucial areas of improvement and implement strategies to enhance the forming and development of mutually beneficial long-term relationships with their customers. The ambition is to improve the current state of working to facilitate long-term customer relationships that go beyond the immediate project requirements of customers. Consultancy Inc. is committed to improving current practices and adopting suitable ways of working to build long-term relationships with their customers to incentivize repeat business.

1.2 Aim

The aim of this thesis is to analyze the current state of Consultancy Inc.'s CX and CRM and identify areas of improvement. Based on Consultancy Inc.'s current practices and relevant theory, this thesis puts forward recommendations and a framework to achieve this goal. The main objective is to contribute to the company's success in terms of establishing long-term relationships with customers to increase repeat business and strengthen customer relationships.

2. Theoretical framework

In this section an analytical theoretical framework is developed that serves as a theoretical foundation for the thesis to be applied in the analysis. The section starts out by introducing customer centricity and a service-oriented approach before diving into the three main themes consisting of: customer experience (CX), customer experience management (CXM), and customer relationship management (CRM). By establishing an overview of customer centricity and service-oriented approaches, context is provided for understanding the following themes of CX and CXM before delving into the specifics of CRM, thereby building a logical progression of concepts

2.1 Towards a Customer Centricity and Service-Approach

Over the past several decades, marketing has seen a shift from the previously adopted logic that was based on the exchange of goods. These goods are tangible resources with embedded value and are exchanged between companies and their customers through transactions. A shift of logic occurred due to new perspectives of how to view customers and manage these customers. The shift of logic towards a more service provision-based logic meant that intangible resources, relationships and cocreation of value became increasingly important for companies to consider (Vargo & Lusch, 2004).

As the service-centered approach became more widely adopted, companies embraced the idea of attracting and retaining customers through a higher level of customer engagement. Subsequently the increased engagement of customers allows companies to offer better value propositions than their rival companies by viewing the customers as coproducers (Vargo & Lusch, 2004). Normann and Ramirez (1993) expand on this idea by emphasizing that the key to generating value for customers lies in coproducing offerings that involve them, which means actively engaging customers in the creation of products or services. Davis and Manrodt (1996) argue that a service-centered view is customer oriented and relational. The authors make it clear that companies can benefit from changing their view of customers to coproducers rather than targets.

2.1.1 Customer Focus and Leadership

Companies can adopt customer centered strategies by actively prioritizing customer needs and expectations, which is a well-known approach called customer focus (Gupta, 2023). In practice, this can result in developing a company culture dedicated to improving customer satisfaction while building long-term relationships. Morgan (2023) states that customer leadership goes beyond customer focus and implies putting the customer first in all business activities by meeting customer needs with the goal of enhancing CX. For this strategy to be successful, companies must actively exceed expectations and create the best customer value. Gupta (2023) argues that there are diverse ways of improving the CX such as capturing and implementing customer feedback and tailoring personalized experiences. Customer-oriented companies may outperform their competitors as they can better anticipate and use customer feedback to provide superior value and customer satisfaction through their offerings. This implies that customer focus can be linked to organizational learning that can result in improved outcomes (Brady & Cronin, 2001). Therefore, this can be considered an incentive for companies to shift from a business-oriented perspective to a more customer-centric one, aiming to prioritize customer leadership to gain a competitive advantage (Van Gelder, 2023). Furthermore, this approach is a driving force for differentiation, customer loyalty and sustainable profitable growth.

2.1.2 Customer Value

Maza (2013) states that customer value can be defined as how much a given product or service is worth to a customer. This is subjective as products and services can be perceived differently by customers depending on their existing expectations and the perceived value provided. Maza (2013) goes on to explain that even though price is universal the perceived value can be different due to factors such as customer experience and how well the product or service satisfies the need of the customer by allowing them to achieve their goals.

Companies need to be able to deliver customer value to attract and retain customers in the long term. It is crucial for companies to understand and meet customer expectations and needs and evaluate how they change as this creates customer loyalty and increases the average lifetime value of the customers (Mahajan, 2020). Zendesk's 2022 Customer Experience Trends Report showcases that over 90% of customers will spend more with companies that provide their preferred choice of getting in touch with customer service and offer personalized customer service. Over 60% of business leaders claim that customer service can directly lead to further growth.

Huber et al. (2001) expand on the topic and argue that customers evaluate more than the price of a product or service when determining its value. Other variables such as time costs, learning costs, and even emotional costs are aspects that are considered by the customers to determine the value of a product or service.

2.2 Customer Experience (CX)

The history of customer experience can be traced back to the mid 19-hundreds. The concept gained popularity in the 1980-1990's as businesses shifted their approach of viewing customers as rational decision makers. It became evident during this era that there is an emotional aspect to purchasing behaviors in scenarios such as selecting brands and products or services (Almada & Rosaaen, n.d.). The age of information that has lasted the past century has led to significant leaps in the development of CX. However, the longevity of relationships risked being sidelined as it was harder for customers to switch to a new provider which decreased the need to place a large emphasis on long-term relationships (Almada & Rosaaen, n.d.).

In the past few decades, the term customer experience has become more widely adopted and received more attention in business-related contexts and academia. Palmer (2010) argues that there are paradoxes in the term's use and practical implications. Due to CX being unique to each customer depending on contextual factors such as time and space, its usefulness is limited from a managerial and practical perspective. Lemke et al. (2006) also claim that the definition and the importance of CX as a concept are currently a source of controversy. However, Fuca (2021) argues that CX matters more now than ever and highlights multiple examples

of how to incorporate it, such as efficiently and seamlessly gathering customer feedback and quickly taking action to respond accordingly.

Iwuzor (2023) defines CX as “the overall interactions a customer has had with a brand right from the point of awareness to purchase to loyalty or churn.”.

Furthermore, it is stated that CX is about delivering superior experiences and growth for customers, which is becoming increasingly important because how an organization delivers for its customers can sometimes be considered even more important than what they deliver (ibid.).

Gupta and Vajic (2000) define CX as the interaction between a business and its clients that is created, for instance, when a service or product is provided. The experience part refers to the client's perception of perceived knowledge and other sensations that are prevalent because of the client's expectations aligning with their perception throughout the entire interaction process. The CX encapsulates the entire scope of an offering, even if the offering is a physical product, such as customer care, features, reliability, and advertising (ibid.).

The reason customers buy products or services vary and some examples include purchasing out of necessity, convenience, fear of missing out, peer recommendations and obligation (Wells, 2023). In essence, it is not the sense of ownership that compels the customer but rather the value they perceive that the product or service may entail. The goal of excellent customer experience is to identify and adapt an offering to provide more value for customers through the experience (Lemke et al., 2006).

Becker and Jaakkola (2020) argue that CX is the result of internal and subjective reactions that customers have at various points during their interactions with a company. These reactions are not only limited to the experiences customers have when the purchase takes place, but also include the stages before and after the purchase has been made. This can, for instance, refer to cases where customers need support from company representatives or technical support before or after the purchase.

Due to differing definitions, CX in this thesis is defined as the dynamic and personalized sum of interactions a customer has with a brand, encompassing emotional connections and touchpoints throughout the entire customer journey, from

initial awareness to post-purchase advocacy. It involves delivering superior experiences, strategically differentiating offerings through emotional elements, and fostering long-term relationships by prioritizing customer satisfaction, perceived value, and enjoyment, as outlined by various authors such as Lemke et al. (2006), Iwuozor (2023), Gupta and Vajic (2000) and Becker and Jaakkola (2020).

2.2.1 Differentiate Offerings by Customer Experience (CX)

CX can be viewed as an attractive part of the total offering that customers actively seek out when acquiring goods or services. Previously, CX was grouped alongside services provided by companies, but as customers increasingly demand experience, companies must focus on CX (Pine & Gilmore, 1998). Due to the evolution of competitive differentiation, aspects previously considered attractive in the eyes of customers became expected (Litten, 2020). Generic aspects such as product- and service quality were viewed as important drivers for future outlooks which caused companies to have similar developments and therefore led to a lack of differentiation while high quality became a standard expectation of customers (Palmer, 2010). As the status quo changed, companies need to find new ways of achieving a competitive advantage by utilizing CX as opposed to older differentiators such as quality and price (Gronholdt et al, 2014; Palmer, 2010). Companies that already place a large emphasis on CX on a strategic level tend to strive to increase customer loyalty, reduce churns and attract newcomers which in turn increases revenue. Many companies, however, are still not very efficient in providing successful CX since transforming it into an advantage requires continuous dialogue with customers, making use of the feedback obtained and innovating in response to it. The companies that can develop these capabilities will be able to reap financial benefits (Wereda, 2016).

2.2.2 Customer Experience in B2B Context

Lemke et al. (2006) conducted a study on CX and found some differences between CX in the context of business-to-business (B2B) and business-to-customer (BTC). For B2B context, seven important factors to establish excellent customer experience were presented.

1. The extent of personal contact between a company and its customer which ranges from personal to impersonal contact (p.13).
2. The flexibility of the company to adapt and personalize their products or services which range from flexible to inflexible (p.13).
3. The degree of how well they understand the needs of their customers.
4. Knowledge required to add value to customers (p.13).
5. Continuously reviewing that customers are satisfied which range from proactive reviews to reactive reviews (p.13).
6. Continuously adhere to customers' objectives (p.13).
7. Commitment to promises which range from keeping to not keeping promises (p.13).

Lemke et al. (2006) argue that these factors are important in practical applications. For instance, the authors argue that continuous and personalized interactions can be appreciated by customers to varying degrees. This highlights the importance of the second and third factor. Another example concerns the seventh factor and states that companies that consistently keep promises to customers perform better than those with a low degree of promise fulfilment.

2.2.3 Customer Journey and Customer Touchpoints

Lahey (2023) describes a customer journey as the process or the path a customer usually follows when interacting with a company or a brand. These stages include multiple points of interaction between customers and companies and the products and services they offer. Lahey (2023) refer to these points of interaction as *touchpoints*, which are defined as any time a customer interacts with a company regardless of whether that's through an employee, advertisement, or other channels. The perception customers have at given touchpoints lays the groundwork for how they view companies. Miranda and Watts (2022) state that the customer journey is a term that is used to describe the trajectory of customers moving along different touchpoints when interacting with a company. If the touchpoints are singular points of interaction, the customer journey is a map covering all touchpoints and how they relate to each other, meaning how customers move from one touchpoint to another as a series of steps. The customer journey is frequently divided into five distinct stages. The names of the

stages can vary depending on the source but tend to be similar in their meaning. Presented below is a customer journey and the five stages of awareness, consideration, purchase, retention, and advocacy (LaFleur, 2022).



Figure 1. illustrates the customer journey, depicting the five stages of awareness, consideration, purchase, retention, and advocacy (LaFleur, 2022).

The several stages of a customer journey are usually plotted as a timeline that describes the interactions a customer has with a company throughout several phases (ibid.). Adobe (2023) argues that a customer journey should be separated from the buyer journey as the buyer journey follows the customer from the moment, they become aware of a product or service until they purchase it. The customer journey, however, extends beyond the purchasing stage and considers how products and services are used and recommended.

Adobe (2023) describes the awareness stage as the stage of potential customers becoming aware of your company and offerings. The perceived awareness can be either active or passive depending on if customers actively search for a solution to their problem or if they are indirectly exposed to offerings. At this stage customers start investigating their options, meaning companies should focus on answering their questions and building trust. The next stage of the customer journey is the consideration phase. Qualtrics (n.d.) describe this stage as the stage where customers have gathered information about different offerings and now start to compare them. Here companies and their offerings are compared to other companies and alternative offerings. At this stage companies need to provide customers with information that

the customers deem valuable, such as how their offerings differ from competitors. It is also noteworthy that customers can gather information beyond what they are provided with by the companies such as reviews made by previous customers.

This decision stage is crucial as it is here where potential customers make their final decision and potentially become customers of a company. During this stage the customers have narrowed their options and are ready to commit to a certain offering. It should be noted that customers at this stage might still go with competing offerings after seeking additional information, often regarding pricing, specific features and overall value proposition. Subsequently, Fields (2022) argues that marketers and sales teams play an important role at this stage as they can provide clear and compelling information that facilitates the customers' decision-making process and addresses concerns that they might have. The author states that it is important for companies to focus on providing a positive customer experience at this stage as it directly impacts customer satisfaction, loyalty and retention.

The two following stages are the retention stage and the advocacy stage. Rodriguez (n.d.) argues that the retention stage of the customer journey focuses on maintaining and enhancing the relationship between companies and their customers after a purchase has been made. At this stage it is important for companies to ensure that customers remain satisfied and continue to derive value from interacting with the companies. As companies aim to foster long-term engagement with customers, they need to prioritize increased customer loyalty. Rodriguez (n.d.) explains that this can involve personalized interactions, ongoing communication and exceptional customer service. Additionally, companies can choose to utilize loyalty programs, exclusive offerings and regular updates to keep customers engaged. Adobe (2023) states that companies try to retain customers to maximize the customer lifetime value, and by prioritizing customer satisfaction and maintaining strong relationships, companies can create a loyal customer base that forms a strong foundation for sustained success.

Rodriguez (n.d.) argues that the advocacy stage of the customer journey is where companies want to turn satisfied customers into enthusiastic promoters that advocate for the company. The author states that great CX leads to customer advocacy as satisfied customers are more likely to advocate on a company's behalf. Advocacy is closely tied to enthusiasm and customer loyalty which subsequently makes it the

responsibility of companies to deliver exceptional experiences. After successfully retaining customers, companies need to leverage their positive experiences to generate word-of-mouth marketing and build a community of promoters. Qualtrics (2023) states that companies should aim to facilitate customer advocacy as it can lead to sustainable growth through organic referrals and therefore should be viewed as a strategic move that complements established marketing efforts. Kulev (2023) identifies multiple ways to facilitate customer advocacy such as referral programs, social media engagement, analyzing and responding to customer feedback as well as incentivizing customer loyalty. Gruner (2021) argues that the customer journey is a crucial aspect of any company as it encapsulates all the interactions a customer has with a company from initially being exposed to a company's offerings to potentially becoming an advocate for its products or services. This makes it essential for companies to create a seamless and positive customer journey that can meet the needs and expectations of customers and ensure an excellent customer experience.

2.2.4 Loyalty

Szaniawska-Schavio (2023) defines customer loyalty as the customers' willingness and likelihood to keep purchasing products and services from a company meaning high degrees of loyalty manifests when repeat business occurs between the company and its customers. The author states that customers tend to make repeat purchases, rather than switching to competitors when they have positive experiences with a company as it lays the groundwork for developing a long-term relationship.

Allan et al. (2020) discuss the determinants and prerequisites for customer loyalty and state that customer satisfaction and loyalty are intuitively linked. The satisfied customers have the highest potential to become loyal and similarly, dissatisfied customers are more likely not to remain loyal and may influence other potential customers through word-of-mouth. The authors argue that the relationship between loyalty and satisfaction is not linear, but rather that there exists an asymmetry where loyal customers are satisfied but satisfied customers are not necessarily loyal. This asymmetry exists due to other determinants for customer loyalty such as quality of the relationship and perceived value. Bloomberg (2009) also states that satisfying customers is a prerequisite for customer loyalty, not a guarantee. One reason for this

is that satisfaction is subjective and therefore perceived differently by customers although they might have similar interactions with a company. McKinsey (2022) expands on the topic and explains that the impact of customer satisfaction on loyalty is highly influenced by CX. Consequently, companies should identify CX, and customer satisfaction as intertwined key areas for loyalty.

Al-Maamari and Abdulrab (2017) discuss the determinants for customer loyalty in service organizations. The six main factors identified are customer satisfaction, trust, service quality, perceived value, perceived enjoyment and technology. Al-Maamari and Abdulrab (2017) reiterate the previously stated belief that customer satisfaction is positively correlated to loyalty. Trust is the second determinant and is stated to be crucial for customer loyalty to be established as trust is a prerequisite of loyalty. Iglesias et al. (2020) expand on the topic and states that research has shown that trust and customer loyalty are linked. Al-Maamari and Abdulrab (2017) further explain that there is a connection between service quality and customer loyalty. Similarly, to trust, service quality is a precursor to loyalty and this determinant can also be viewed as a competitive advantage and driver for success. High degrees of service quality tend to entail higher degrees of customer loyalty suggesting a positive correlation between the two variables. MutiaSobihah et al. (2015) found that service quality is one of the main variables that influences customer loyalty.

Perceived value is the next factor identified by Al-Maamari and Abdulrab (2017) that is closely related to customer loyalty. Ruiz-Molina and Gil-Saura (2008) argue that value as perceived by customers is subjective and closely related to customer attitude and loyalty. In this case, research suggests that repeat purchase behaviors that follow customer loyalty are greatly reliant on the perceived value of the customers when interacting with different products, services, companies, and their competitors (ibid.). Al-Maamari and Abdulrab (2017) also state that perceived enjoyment is positively related to customer loyalty as customer behavior is influenced by customers' experienced satisfaction. Lastly the authors identified technological perceptions as having a positive impact on customer loyalty. It is, however, stated that there is a lack of research on the topic but that current research seems to suggest such a link between technological perceptions and customer loyalty. Zhou (2013), for instance, found that

technological perceptions impact continuous customer usage when studying mobile companies' sites in China.

2.2.5 Implication to the Study

Due to differing definitions, CX in this thesis is defined as the dynamic and personalized sum of interactions a customer has with a brand, encompassing emotional connections and touchpoints throughout the entire customer journey. CX involves delivering superior experiences, strategically differentiating offerings through emotional elements, and fostering long-lasting relationships by prioritizing customer satisfaction, trust and perceived value.

In the exploration of B2B context, the study will adopt Lemke et al.'s (2006) model, focusing specifically on the factors related to personal contact (1), understanding customer needs (3), and continuously reviewing that customers are satisfied (5). These aspects will be instrumental in assessing how Consultancy Inc. can enhance its CX strategies in the B2B domain.

Regarding the customer journey model, the study concentrates on the last three stages, purchase, retention, and advocacy aligning with Consultancy Inc.'s goal of fostering long-term relationships. The analysis will extend to examine touchpoints within these stages, aiming to identify pivotal moments that significantly impact customer perceptions. When analyzing loyalty, the study will narrow down the focus to four critical factors derived from Al-Maamari and Abdulrab (2017): customer satisfaction, trust, perceived value, and perceived enjoyment.

2.3 Customer Experience Management (CXM)

Similarly, to customer experience, which is sometimes considered controversial due to the vague nature of its definitions, CXM shares this characteristic. According to Dolan (2013), CXM is not yet well-defined and is more of a concept than a single solution that is meant to capture the entirety of the experience a customer has with a company. Furthermore, the concept is also interchangeably used with similar ones

like Customer Relationship Management (CRM). Collier (2022) argues that the definition of CXM can be perceived as vague as it is a broad subject making it difficult to define a concise definition.

Fluckinger (2023), defines CXM as “the collection of processes a company uses to track, oversee and organize every interaction between a customer and the organization throughout the customer lifecycle”. Subsequently the author explains that CXM refers to the strategies, methods and tools used to improve the CX. Ennova (n.d.) reiterates the importance of implementing effective CXM in order to succeed and defines it as “the process of managing all interactions a customer has with your company – the entire customer journey – with the goal of improving overall customer satisfaction, loyalty and advocacy by meeting or exceeding their expectations, and, thus, establishing a positive perception of your company in their mind”.

CXM strategies are highly reliant on the voice of customers to accurately portray the customer's experience which can then be used to change the part of the customer experience that generates negative feedback. CXM strives to improve the customer experience rather than CRM strategies that focus on utilizing data analysis, trends and viewing customers in terms of statistics to achieve increased sales numbers and outreach to customers to obtain higher revenue. Goldberg (2023) argues that CRM can be regarded as less experience centric as the data collected is often what is easily measured and not necessarily the information required to help develop the customer experience in an impactful manner in the long run. CXM on the other hand aims to improve the customer experience by delivering qualitative insights by unifying data across the customer lifecycle.

2.3.1 Different Metrics Measuring Customer Experience (CX)

There are multiple ways of evaluating CXM in a company. Ennova (n.d.) gives examples of CXM metrics that enable a company to have an accurate overview of their CXM efforts and strategies which subsequently speed up identifying improvements. These metrics include net promoter score (NPS), customer satisfaction score (CSAT), customer effort score (CES), customer churn rate and customer lifetime value (CLV).

Bunker (n.d.) states that NPS is a widely used metric used in CX programs that seeks to measure how loyal and satisfied customers are by evaluating how likely they are to recommend the company to others using a scale from 0 to 10. The customers that are likely to recommend a company are known to be *promoters* (9-10,) while those who are likely not to recommend a company are called detractors (0-6). There is also a category known as passives (7-8) that are satisfied but not likely to enthusiastically recommend your product or service to others (Hojtar, 2023). The range intervals of promoters, passives and detractors is showcased below:

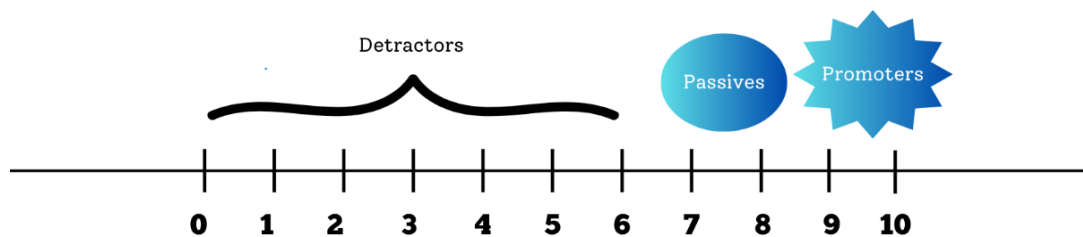


Figure 2. shows the range intervals of promoters, passive, and detractors.

NPS provides a snapshot of the CX as a high score, meaning a higher degree of promoters tends to point at satisfied customers. The formula for calculating NPS by first calculating the percentage of promoters and detractors and then subtracting the percentage detractors from the percentage promoters as showcased below (Hojtar, 2023):

$$\text{NPS} = \% \text{ Promoters} - \% \text{ Detractors}$$

NPS scores can range from -100 to +100 based on how customers respond to the survey. Any score above 0 indicates that a company has more promoters than detractors as the formula would yield a positive NPS score. Later, a negative NPS score indicates that the percentage detractors are higher than the promoters (Hojtar 2023).

2.3.2 Process of Improving Customer Experience

A consultancy firm has developed a process with the goal of enhancing customer experience (Van Gelder, 2023). The process consists of the following steps;

1. CX-maturity assessment

The initial step involves assessing the current state of a company. This assessment is based on predefined elements for understanding and improving CX (Van Gelder, 2023). The elements are as follows;

- **Vision, Targets, and Strategy:** Evaluating the alignment and commitment of the organization towards CX goals and strategies.
- **Market- and Customer Insight:** Analyzing the level of understanding and responsiveness towards customer view and insights.
- **Customer Lifecycle Management:** Assessing the extent to which customer journeys are defined and integrated into organizational processes.
- **Communication:** Examining the personalization and relevance of communication channels from the customer's viewpoint.
- **Offerings and Services:** Evaluating the adaptation of product offerings and service development to meet customer needs.
- **Way of Working:** Assessing the organizational focus on optimizing CX through cross-functional teams and collaborative efforts.
- **Tools:** Evaluating the use of tools that support customer-centric ways of working.
- **Follow-up and Analyses:** Analyzing the structured and continuous follow-up on CX-related activities and KPIs.

2. Development of CX-vision and roadmap

The next step, after finishing an assessment, is to set a CX-vision and define a roadmap based on the as-is maturity level. This process aims to identify the desired targets and milestones across various factors of CX-maturity. The roadmap is developed to visualize the needed work and timelines to achieve the established CX-vision. It acts as a strategic recommendation with distinct strategies and actions for an organization to employ to improve CX (Van Gelder, 2023).

3. Map the customer journeys and touchpoints

This step will entail defining and visualizing the various interactions customers have with a company, identifying the touchpoints. Through comprehensive mapping of these journeys and touchpoints companies get an insight into the customers' perspectives and can therefore optimize the interactions at each touchpoint (ibid.).

4. Identify the most critical customer journeys and touchpoints.

Critical journeys and touchpoints are prioritized according to their effect on the CX to maximize it. Companies pinpoint the most critical touchpoints to prioritize since investment in these will yield the largest impact on customer satisfaction and loyalty (ibid.).

5. Measure/assess/evaluate CX in the prioritized touchpoints

In this step, companies apply multiple metrics and assessment tools designed to measure CX initiatives performance in the prioritized touchpoints. By continuously assessing and evaluating these areas, adjustments can be made meanwhile this ensures that there is an alignment with CX strategies and goals (ibid.).

6. Combine and analyze the experience (x-data) and the operational data (O-data)

At this step, companies use metrics and tools to analyze customers' behaviors, preferences and pain points to gain deeper customer insights and enable a more data-driven decision-making process. Experience data (X-data) collected from customer interactions is combined with operational data (O-data) to provide a holistic view of CX-level (ibid.).

7. Improve CX and the results

The final step includes implementing targeted initiatives and strategies to improve CX based on insights received from data analysis. Through continuous improvements and efforts, companies can achieve the goal of increasing customer satisfaction, loyalty and other business outcomes that indirectly get impacted (ibid.).

2.3.3 Implication to the Study

For this thesis, CXM is defined as the coordination of processes aimed at monitoring and organizing every interaction between a customer and an organization across the customer lifecycle, with the primary objective of improving overall customer satisfaction, loyalty, and advocacy. This definition is based on ideas from Fluckinger (2023), Collier (2022) and Ennova (n.d.). In alignment with these diverse perspectives, the study explores and evaluates CXM practices within Consultancy Inc., focusing primarily on NPS for analysis due to its prevalent use within the company. However, recognizing the importance of longevity, the study will also consider additional metrics such as CSAT, CES, Customer Churn Rate, and CLV when formulating final recommendations. Regarding the process of improving CX, this process will set the trajectory of the master thesis since the steps will land on a comprehensive analysis as well as final recommendations for Consultancy Inc. More specifically, the study will make use of step 1-4 when conducting the analysis.

2.4 Customer Relationship Management (CRM)

Customer relationship management (CRM) is a vital component in all business contexts to successfully help companies to build and maintain strong relationships with existing and prospective customers (Knox et al., 2007). CRM involves integration of people, processes, systems, and tools to create best practice and to enhance profitability and growth. The resources are used to gather, organize, and analyze data retrieved from customers to understand their needs, preferences, and behaviors. The data can include contact information, historical transactions, and feedback. Knox et al. (2007) stress that organizations can take advantage of this data by personalized interaction and tailored services, ultimately improving customer satisfaction and loyalty. CRM also leads to increased sales and revenue, improved marketing effectiveness, and operational efficiency. By fostering stronger relationships with customers and providing personalized experiences, companies can gain a competitive advantage in today's dynamic market landscape.

2.4.1 The Role of Relationships in Consultancy Firms

It is of high importance to cultivate effective, long-lasting relationships with its customers, especially for consultancy firms that operate in a landscape that is dependent on long-term relationships (Krejci, 2022). Furthermore, Krejci (2022) highlights five key attributes that a consultancy firm must possess to build long-lasting and effective relationships. Those are; trust, relationship management, clear communication, culture fit and competent consultants.

Trust is emphasized as the most important attribute for a relationship that sets the basis for a relationship (Krejci, 2022). Usually, consultants engage tightly with the most core parts of a customer's business, which makes it vital to develop trust between both parties. Without customers' trust in a consultancy firm's dedication to their concerns, it's impossible to foster a lasting, trust-based relationship. Equally important is to have mutual trust since it allows deep and honest communication, effectiveness and as a damping tool for conflicts. The second attribute revolves around managing relationships and the importance of continuously developing relationships as the customer needs change. The third attribute regards having a high degree of transparency to get a better understanding of the business but also to avoid any miscommunication. Fourth, culture fit means finding the appropriate consultant who can seamlessly integrate into the client's culture and environment. Lastly, competent consultants understand the importance of choosing clients wisely to build long-term, mutually beneficial relationships. They prioritize customer satisfaction and seek opportunities where they can contribute effectively, ultimately aiming for successful business (ibid.).

Boonstra (2023) stresses the importance of collaborative relationships for consultancy firms. The author proposes six principles that are crucial for building a sustainable relationship. Firstly, an organization should prioritize collaboration with inspiring and committed people that are involved in a change process. Secondly, an organization should have an alignment of their own purpose and values with their customers. This alignment serves as an anchor point for the business, fostering deep customer relationships. Thirdly, one of a consultancy firm's ambitions should be to have a

tangible impact on transformational goals. Furthermore, consultancy firms should embrace challenges and complexity in problem-solving, recognizing the value of innovative approaches. This mindset promotes engagement and ownership among stakeholders. Another principle considers time investment, an important factor that must be assessed towards the outcome of the efforts. Finally, consultancy firms should put emphasis on evaluating reimbursement based on the level of impact and engagement involved. By adhering to these six principles, a consultancy firm can foster trust, collaboration, and long-term success.

Geraldes et al. (2018) discuss the perspectives of a relationship in management consulting firms. One of their main findings is that a specific personal relationship with a customer cannot be copied and applied to other clients. Moreover, it is essential to recognize that successful and effective relationships play a vital role in shaping the knowledge generated within the consulting industry. Karantinou and Hogg (2007) explain that building strong relationships with the clients within the consultancy sector is fundamental to success and profitability. Although the recognition of the importance of strong relationships, there is still limited research attention for this context in general. In the paper, they conceptualized two frameworks which aim to firstly identify the key success factors for developing long-term relationships and secondly, the approach and strategies for obtaining optimal management of relationships in the consultancy sector. Ten critical success factors related to developing long-term relationships in consultancy firms are identified (ibid.).

1. High quality result
2. Improved client performance in the marketplace
3. Active/Close monitoring of satisfaction
4. Careful handling of the process aspects of the service
5. Personal chemistry
6. Personal relationships
7. Similarity of philosophies
8. Continuity of contact, consistency and personal attention
9. Empathy, care, active involvement, and genuine interest in the client's well-being

10. Corporate events, workshops, and seminars

Furthermore, Karantinou and Hogg (2007) point to eight mechanisms for optimizing relationships management in consultancy firms;

1. Active and careful management of relationships
2. Structured key account management
3. Careful selection of key accounts
4. Centralized management of relationships
5. Different handling at different stages of the relationship
6. Effective coordination of relationships across levels
7. Careful change management and effective succession planning
8. Good inter-departmental coordination for successful relationship expansion

2.4.2 Customer Relationship Stages

Ford et al. (1998) state that relationships vary as they evolve over time and further, they argue that managing the development of relationships is a key factor for business success. They point to four different stages in a relationship, with key factors determining the depth of relationship which are learning, investment, adaptation, trust and commitment. The four stages are the pre-relationship stage, the exploratory stage, the development stage, and the stable stage. The pre-relationship stage consists of evaluating the counterpart based on some pre-determined aspects before even considering them as a possible actor in their business and challenging themselves by setting clear requirements and needs. The second stage is the exploratory stage where communication between stakeholders takes place regarding a potential purchase. In comparison to relationships in other stages, the relationships in the exploratory stage can appear costly and uncertain. The third stage is the developing stage, in which the relationship is developing and flourishing the business, for instance by repeat business. The parties are well understood in the other's ambitions and abilities. In this stage, there is a risk for a relationship to revert to the pre-relationship stage if the parties do not fulfil the right level of learning, investment, adaptation, trust, and commitment. The final stage, the stable stage, in which the relationship has reached a

certain mature stage, involves a high level of investments, learning, and commitment. Thus, in this stage the relationship is beneficial for both parties, for instance by establishing a standard way of working, code of conduct, and trust.

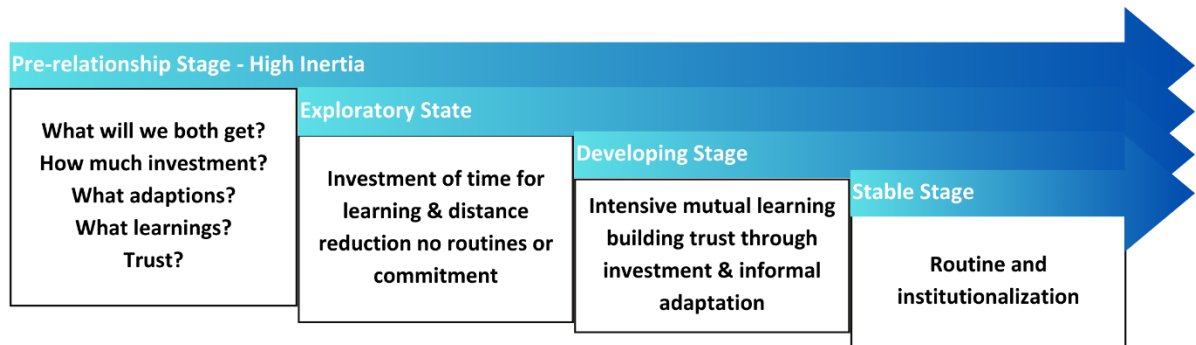


Figure 3. Different stages of a customer relationship (Ford et al., 1998).

2.4.3 Implication to the Study

In this thesis, CRM is defined as a vital integration of people, processes, systems, and tools to build and maintain robust relationships with customers and provides a foundational understanding (Knox et al., 2007). The study will strategically employ key principles and frameworks derived from Krejci (2022), Boonstra (2023), Geraldles et al. (2018), Karantinou and Hogg (2007), and Ford et al. (1998), shaping a comprehensive lens through which to analyze the relationships in Consultancy Inc.

By emphasizing Krejci's (2022) four principles the study will delve into the foundational elements crucial for effective and lasting relationships. The study incorporates Boonstra's principles, specifically focusing on one principle, namely collaboration.

Drawing from Karantinou and Hogg's (2007) ten success factors, the study will mainly focus on active/close monitoring of satisfaction (3), personal relationships (6), continuity of contact, consistency and personal attention (8). Furthermore, from their second framework regarding eight mechanisms for enhancing relationships management, the study will mainly focus on active and careful management of relationships (1), structured key account management (2), different handling at different stages of the relationship (5) to analyze and evaluate the elements influencing relationship dynamics and success in Consultancy Inc. Moreover, Ford et

al.'s (1998) model, focusing on the developing stage and the stable stage of a relationship, will be utilized to provide an in-depth understanding of Consultancy Inc.'s customers.

2.5 Analytical Model and Research Questions

The analytical model presented serves as a guiding framework to analyze Consultancy Inc.'s current CX practices, enabling to effectively address the research questions and draw insights from both theoretical frameworks and empirical data. The analytical model is designed to align with the research questions to provide strategic improvements in CX and CRM to develop long-lasting customer relationships. The model is structured around three main themes; CX, CXM, and CRM.

Within CX, Consultancy Inc.'s perspective on customers is analyzed to examine Consultancy Inc.'s current approach towards customers and factors influencing CX. Moving to CXM, the focus shifts to an as-is analysis of Consultancy Inc.'s current way of working, additionally metrics and tools are discussed to evaluate the effectiveness of CX initiatives. Regarding CRM, Consultancy Inc.'s CRM mechanisms are examined, including different stages of customer relationships and factors influencing CRM, such as communication strategies and feedback mechanisms.

Relating to the aim of the thesis, the following research questions (RQs) focus on Consultancy Inc.:

RQ1: How are customer relationships assessed?

RQ2: What are the key factors influencing customer experience in the current way of working?

RQ3: What strategies can be implemented to develop long-lasting relationships with existing and potential customers?

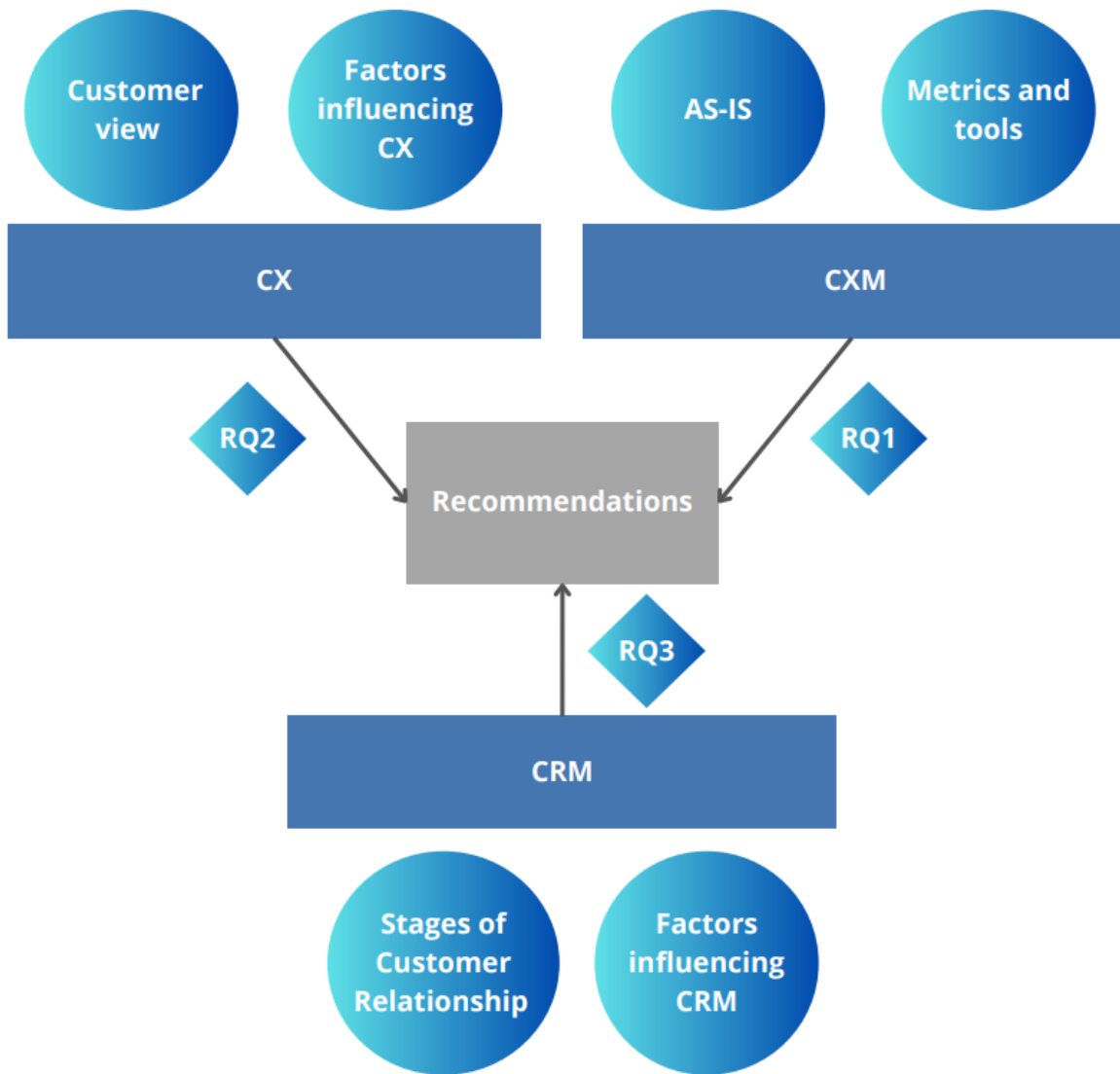


Figure 4. Illustrates the analytical model.

3. Methodology

This chapter discusses and presents the chosen research strategy and methodology and includes descriptions of the research process and data collection methods. The chapter ends by discussing the quality of the research.

3.1 Research method

Johannesson and Perjons (2014) define research strategy as “an overall plan for conducting a research study” (p. 42). The strategy is used to plan, perform and evaluate a study but needs to be complemented with research methods that help advance the study on a more detailed basis. These methods refer to how researchers gather and analyze data. A research strategy should appropriately support researchers depending on the research question's context. For instance, case studies can be used to analyze specific customer relationships but still not necessarily be an appropriate research strategy in another context. Johannesson and Perjons (2014) state that examples of research strategies include experiments, surveys, case studies, ethnography, grounded theory, action research, phenomenology, simulation, and mathematical as well as logical proof. This case study mainly makes use of data from survey results, historical data, and interviews.

Lakshman et al. (2000) separate quantitative and qualitative research methods stating that quantitative research examines how factors affect an outcome in terms of numerical values and is often analyzed statistically. Lakshman et al. (2000) state that quantitative research tends to be displayed in numbers and graphs and is used to find generalizable facts about a topic depending on collected data. Subsequently, this means there is a risk for potential bias such as selection. Qualitative research however is applicable in situations where statistical analysis is insufficient such as when it is unclear what variables to analyze to find different outcomes or when the sample size is too small for any meaningful conclusions to be drawn. Like the previous case, there is also a risk for potential biases in qualitative research such as recall bias. Eriksson and Wiedersheim-Paul (2008) explain that qualitative research needs to be supplemented with relevant literature to give a comprehensive understanding of a topic. Therefore, the study used relevant literature to increase the theoretical

understanding of concepts relevant for thesis and avoid potential biases by comparing material from multiple sources. The main bulk of the literature stems from sources found using search engines like Google scholar and through databases like Chalmers Library.

3.2 Research process

The research process followed a series of pre-planned steps that changed throughout the study. It started with a seminar led by an experienced CX expert, which sparked a strong interest in the topic. Afterwards, there was a discussion with Consultancy Inc. to make sure both parties were interested in evaluating their CRM practices, which was originally the focus of the thesis. Moreover, an initial theoretical framework was developed to create a better understanding of how to analyze the empirical findings. Discussions with the supervisor at Chalmers and Consultancy Inc., respectively, served to navigate the direction of the theoretical framework to ensure it would provide a solid academic foundation for the research. The theoretical framework was continuously developed and improved based on supervisor feedback and discussions during the interviews. The research questions were altered throughout the research process to more accurately reflect the problem discussion and the analysis of the data. In essence, systematic combining as described by Dubois and Gadde (2002) was employed and refers to developing the theoretical framework, empirical fieldwork and case studies simultaneously. The authors argue that by constantly going back and forth between research activities involving empirical data and theory, the understanding can be improved (ibid.).

For example, to gain deeper insights, an in-depth interview with the previously mentioned CX expert was conducted where the scope of the project was discussed. The interview questions were based on the theoretical framework. The interview mainly revolved around discussing CX and CRM in the context of a consultancy firm. The expert provided his expertise that was later used in combination with literature to formulate interview questions for the semi-structured interviews with the Operational Excellence and Growth manager (OEG manager) at Consultancy Inc.

In addition, an interview with Consultancy Inc.'s OEG manager was carried out to clarify how the thesis can help them achieve their objectives. Quantitative data was provided by Consultancy Inc., which gave an initial insight into the current state. The data provided includes the NPS score, and the associated customer comments based on surveys sent out twice a year to the company's customers. Johannesson and Perjons (2024) state that surveys can provide a company with an overview of their current state regarding social areas. For example, surveys are used in social sciences to gather basic data from large populations. A strength of utilizing surveys is that it provides companies with an easy, quick and often cheap way of gathering data (ibid.). A drawback of using surveys is that some respondents may not be incentivized to provide detailed answers or even respond at all. NPS and similar tools do have drawbacks as stated in the theoretical framework, meaning that there is a potential benefit in using them in combination with other metrics as well as qualitative data. Therefore, quantitative data was also gathered to support the current state mapping and the formulation of recommendations.

During the first interview with the OEG manager, the thesis's goals and scope were revised, resulting in a shift from CRM to focus more on CX. Additionally, this led to the development of interview questions regarding their feedback mechanism and their way of working to improve this area. This adjustment led to a refinement of the theoretical framework and the research questions to match the changed scope. Building on this theoretical foundation, another interview with Consultancy Inc.'s OEG manager focused on operational methods and objectives. This interview provided details regarding the current way of working and previous CX initiatives at Consultancy Inc. to ensure feasible recommendations can be formulated. Potential interviews with Consultancy Inc.'s customers were also discussed to capture the qualitative aspects of their experiences. The Business Unit manager and Business manager suggested customers to be interviewed, where each was treated as a separate sub-case. A request for an interview was sent by email to the selected customers, where five satisfied customers were willing to participate. The original plan was to interview satisfied- and dissatisfied customers to get an accurate overview of the CX and avoid biases. However, the dissatisfied customers were not willing to participate in the study, so two BMs responsible for these customers were interviewed to provide information about these customer relationships. With input from the OEG manager

and thesis supervisor, questions were prepared based on processes and models presented in the theoretical framework to ensure that relevant information was captured during interviews. Before each interview, the respondents were asked for consent to be recorded to ensure high quality and not missing out on information. After each interview, the audios were transcribed and were double checked by reading it through by both authors. Finally, the responses from the BMs and customers were compared, and the authors drew their own conclusions and reflections for the analysis and discussion.

3.3 Data collection

The main type of data in the study was qualitative data gathered from interviews, but some quantitative data has been collected from Consultancy Inc. in the form of NPS data. To understand the current state, data was provided by Consultancy Inc. This data refers to NPS and key takeaways from the interviews and is presented in the empirical data section 4. Complementary data was extracted from relevant sources, mainly books, articles and websites concerning the areas of CX, CXM and CRM.

3.3.1 Primary data

The interviews had a semi-structured approach. George (2023) defines semi-structured interviews as a means of collecting data by mixing traits of structured and unstructured interviews. The author states that these interviews tend to be open, which allows for follow-up questions that are not prepared beforehand and open for discussion. Furthermore, semi-structured interviews can help the interviewer recognize patterns and develop the scope of the research. This can help with establishing new findings while still leaving room for answers to be compared and evaluated. The interview questions were formulated in advance and revised according to feedback from Consultancy Inc. and the supervisor at Chalmers. The interview questions were used as guidelines throughout the interviews. Additionally, this opened for follow-up questions to allow the interviewee to clarify their answers.

3.3.2 Selection of interviewees

The different interviewees were chosen for different reasons to fulfil a certain objective. In this section, the interviewees will be presented with a short motivation for selection. Table 2 provides a short description of each interviewee and the subject of the interview.

Interviewee	Date	Theme discussed during interview
Packaging development director at Customer A	15/03/2024	Interview questions for customers
Supply chain director at Customer B	12/03/2024	Interview questions for customers
Project manager – R&D At Customer C	13/03/2024	Interview questions for customers
Supply chain director at Customer D	21/03/2024	Interview questions for customers
Project manager Customer E	03/04/2024	Interview questions for customers
External CX Expert	14/02/2024	Gain deeper understanding and provided guidance into CX and CXM
Operational Excellence and Growth manager (OEG manager) at Consultancy Inc.	15/02/2024 26/02/2024 16/05/2024	Revision of thesis scope and objectives, and Q&A regarding feedback mechanism
Business Unit manager B (BM B) at Consultancy Inc.	05/04/2024 08/05/2024	Interview regarding sales process, way of working

Business manager A (BM A) at Consultancy Inc.	05/04/2024	Gain deeper understanding of customer dissatisfaction
		Gain deeper understanding of customer dissatisfaction

Table 1. Overview of the interviewees from Consultancy Inc and external interviewees.

3.3.3 Customer Experience Expert

The CX expert was chosen due to his extensive experience and knowledge in the subject of CX. During the interview, the expert provided valuable insights and guidance into the topic. The CX expert played an important role in defining the research methodology as he contributed ideas regarding processes and initiatives that he believes can have great potential in the consultancy sector which was discussed in the later interviews with BMs. His guidance was essential for preparing for the interview with the OEG manager as the thesis was still at an early stage.

3.3.4 Operational Excellence and Growth Manager at Consultancy Inc.

The OEG manager at Consultancy Inc. provided accurate insights into the company's current practices and sales processes. Her knowledge regarding the current practices and CX development made her a suitable person to interview to map the current situation at Consultancy Inc. The OEG manager played a crucial role in developing the as-is analysis and improving the recommendations of the thesis. The OEG manager also provided a description of how the company works to foster and nourish their customer relationships. Furthermore, she provided the NPS data and suggested suitable BMs to interview to collect qualitative data which laid the groundwork for the as-is analysis.

3.4 Secondary data

The secondary data consisted of quantitatively data collected from Consultancy Inc. in the form of NPS metrics and qualitative information collected from various literature sources by utilizing search engines and databases. The literature, sourced from platforms like Google Scholar and Chalmers Library databases, formed the foundation of the theoretical framework, focusing on three main themes: CX, CRM, and CXM. By combining industry-specific metrics, with scholarly insights, we gained a comprehensive understanding of the subject, which informed the analytical model and research objectives and questions. This integration of secondary data enriched the analysis and recommendations, allowing for a thorough exploration of the research questions.

3.5 Research quality criteria's

To ensure the robustness of the research, a triangulation approach was adopted. Triangulation, as described by Bryman and Bell (2011), involves employing multiple data collection methods to reach consensus of the findings. To grasp the complexity of the case, it was crucial to comprehend the interconnections between Consultancy Inc.'s consultants and their customers. Consequently, interviews were conducted with several customers to validate information consistency. The data collection methods used included semi-structured interviews and analysis of secondary sources. By utilizing multiple sources and interviewing a range of stakeholders, the findings were triangulated to a certain extent. This triangulation holds significance both academically and practically as it enhances the credibility of the research while providing Consultancy Inc. with actionable recommendations that also serve as the foundation for further improvement initiatives. The depth of the analysis and recommendations provided is dependent on the accuracy and availability of relevant data. Limitations in access to proprietary information and certain customer data may directly impact the findings of this thesis.

In the qualitative data collection part, accurate documentation of data becomes vital. To mitigate biases, interviews are recorded, provided consent is obtained from the participants, and subsequently transcribed in detail. This practice not only serves to strengthen the richness of the topics within the thesis but also facilitates establishing

clear connections between the conclusions drawn and the collected data—a crucial aspect highlighted by Bryman and Bell (2011) for ensuring the quality of qualitative research.

In another article by Bryman and Bell (2015), they highlight various criteria for assessing qualitative studies, with an emphasis on trustworthiness. Trustworthiness, as defined by Lincoln and Guba (2013), concerns the quality of an inquiry and depends upon whether interpretations and findings derive from a reliable process that can be deemed trustworthy. It encompasses four categories: credibility, transferability, dependability, and confirmability (Lincoln & Guba, 2013).

Credibility revolves around fostering confidence in the findings and interpretations of a research study (Lincoln & Guba, 2013). Techniques recommended by Lincoln and Guba (2013), such as peer debriefing and member checks, aim to ensure credibility. Additionally, Bryman and Bell (2015) advocate for respondent validation, wherein credibility is verified with the individuals involved in the study. In this study, the validation process was conducted through continuous dialogue with the supervisor at Consultancy Inc, and all empirical data collected was subjected to validation by the interviewees. Moreover, the thesis was continuously reviewed by supervisors at Consultancy Inc. and Chalmers.

Transferability concerns the applicability of findings across different contexts or subjects (Lincoln & Guba, 2013). In qualitative research, the goal isn't to achieve generalizability but to provide sufficient context through thorough description (Lincoln & Guba, 2013). This was accomplished by adding empirical background alongside detailed descriptions of all interviewees, their roles in the projects and their relationships with Consultancy Inc.

Dependability concerns the consistency and reliability of the research process (Lincoln & Guba, 2013). External review of data collection, analysis, and conclusions by individuals familiar with the topic can strengthen dependability (Lincoln & Guba, 2013). In this study, supervisors at Consultancy Inc. and Chalmers were engaged to assess and provide feedback on the research process, enhancing its dependability.

Confirmability underscores the importance of ensuring that findings and interpretations derive from an unbiased inquiry process and data collection (Lincoln

& Guba, 2013). Audit procedures can aid in assessing conformability (Lincoln & Guba, 2013). Throughout this research, maintaining objectivity in the analysis and discussion was prioritized. Regular consultation with supervisors provided additional support in upholding objectivity and conformability throughout the thesis progression.

4. Empirical material

This section presents the data collected regarding Consultancy Inc.'s CX and customer relationships. Additionally, this section delves into Consultancy Inc.'s current way of working to assess the current situation and to identify improvement areas. The information below was gathered through interviews with Consultancy Inc. and its customers and with an external stakeholder. Each customer is treated as a separate sub-case ranging from Customer A to Customer E.

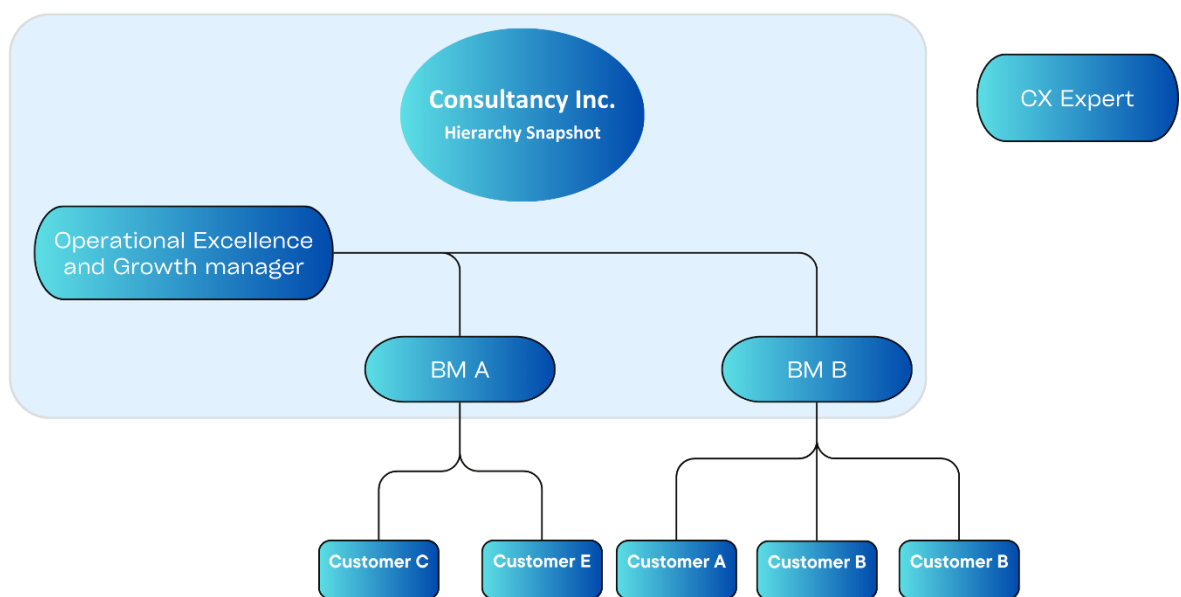


Figure 5. Overview of the participants of the study including BM A, BM B, their respective customers, the OEG manager and the CX expert.

4.1 Current way of Working at Consultancy Inc.

Consultancy Inc. has established a way of working that has been implemented and remained relatively unchanged. The current approach is characterized by a decentralized and personalized interaction model based on continuous improvement and adaptability in response to customer feedback. Other investments such as digital instant-feedback mechanisms have been considered but have yet to be implemented.

Consultancy Inc. are also willing to explore customer-facing initiatives such as newsletters and social events.

Consultancy Inc's current way of working with customers involves several steps. First, during the consideration phase they employ a fixed sales process managed by the Business managers (BMs). They utilize various methods, including video pitches and partner communication tools, to effectively communicate their offerings and value proposition. Also, Consultancy Inc. conducts qualification meetings (QMs) to introduce consultants to a customer. These meetings aim to ensure that the right profile is chosen for the specific role by letting the consultants and the customer interact and discuss a project. Following QMs, Consultancy Inc. sends brief one-page reports summarizing the topics discussed. This one-pager aims to streamline the decision-making process and has historically been appreciated by customers. Moreover, Consultancy Inc. emphasizes the importance of maintaining regular contact with customers to assess satisfaction levels, identify emerging needs, and address any concerns promptly. They recognize that communication preferences vary among customers and strive to accommodate individual preferences, whether through periodic calls, emails, or face-to-face meetings. This approach places responsibility on the BMs to adapt and provide tailored communications channels in the day-to-day business.

Consultancy Inc. conducts NPS surveys twice a year aiming at gathering feedback from customers. These surveys serve as another touchpoint for understanding CX. While NPS surveys provide valuable insights, Consultancy Inc. feels that conducting them only once every six months is insufficient, particularly as the company scales up. They believe that this frequency may not capture the dynamic nature of client relationships and evolving needs. Consultancy Inc. recognizes the importance of instant feedback in customer experience, especially in a rapidly expanding business environment. Moreover, Consultancy Inc. acknowledges that traditional NPS surveys may not always yield honest, accurate and comprehensive feedback, as customers may not feel comfortable expressing their opinions. This highlights a potential limitation of relying solely on this kind of survey for feedback. Additionally, Consultancy Inc. questions the relevance of only using NPS and suggests that a more comprehensive approach, possibly incorporating multiple questions tailored to

specific aspects of their service, may yield more insightful results. Moreover, they express concern about the response rate of their NPS surveys and the inability to effectively capture feedback from all customers. Furthermore, the NPS might be inflated as satisfied customers might be more willing to fill out the survey.

Dissatisfied customers may also be more likely to fill out the survey, however the collected responses showcase a small number of dissatisfied customers. Consultancy Inc. has an internal goal of reaching a response rate of 30% as well as an NPS of 75. This has been achieved in the past and Consultancy Inc. works actively to reach this goal consistently.

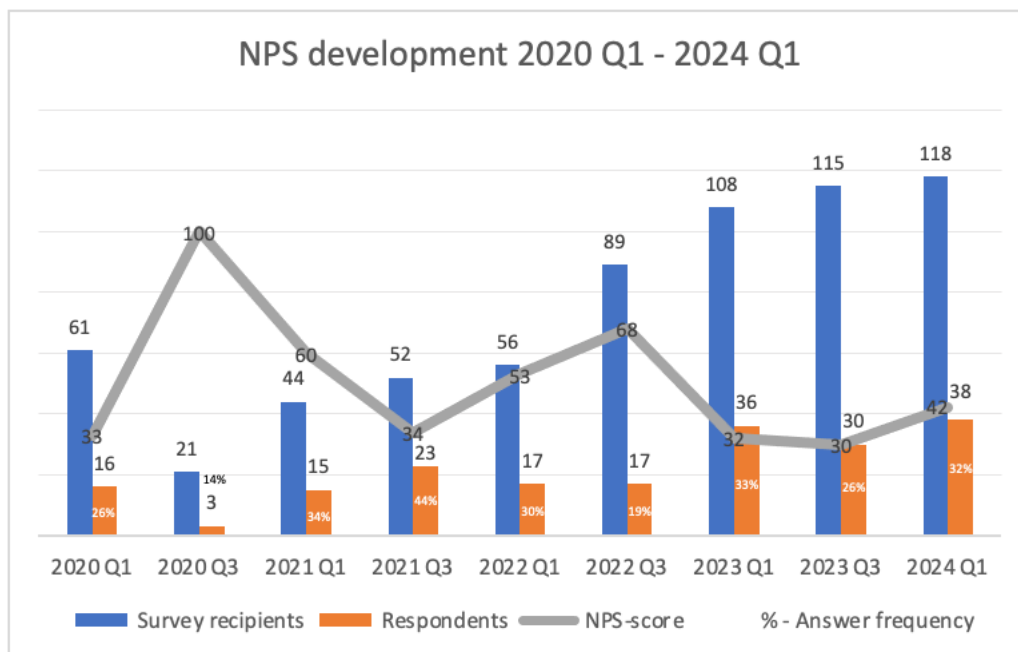


Figure 6. illustrates the historical net promoter Score (NPS) results at Consultancy Inc since 2020 Q1.

To address these challenges, Consultancy Inc. explores new methods to develop their feedback process and make it more responsive to real-time customer needs. They are exploring digital solutions to gather instant feedback such as SMS-based surveys after meetings. By automating feedback gathering, Consultancy Inc. hopes to improve response rates and promptly obtain timely insights into customer satisfaction and customer experience, related to a specific touchpoint rather than the overall experience. Despite these challenges, Consultancy Inc. remains optimistic about the potential for improvement in their feedback process. Consultancy Inc. encourages managers to engage directly with dissatisfied customers to understand their concerns and devise solutions collaboratively. However, there is no defined process established

on how to manage dissatisfied customers, specifically collecting, storing and evaluating information about why they are dissatisfied.

4.1.1 Relationship Management

Consultancy Inc. has actively chosen to prioritize transparency, trust and direct dialogue over anonymity because they believe that fostering honest, two-way communication builds stronger, long-term relationships with customers. For example, they recognize that maintaining long-term relationships requires honesty and reliability. They prioritize open communication with customers, even if it means admitting when they can't fulfill a request or solve a problem immediately. This honesty helps prevent misunderstandings and preserves trust over time. Another example of how they gain the trust of their customers is through certifications such as ISO9001 that enhance their credibility even though they don't believe it will be the sole reason for customers choosing their consulting services.

Consultancy Inc. 's current approach to working with customers stems from a dedication to building long-term relationships where they can respond and adapt based on customer specific needs to improve CX. Consequently, the company mainly focuses on short-term needs by adapting to feedback but wishes to become better at anticipating future challenges and opportunities to achieve a long-term plan of developing their customer relationships.

4.1.2 The Role of Consultants and Business Managers in Customer Relationships

Consultancy Inc. does not rely solely on a single interface for customer contact, instead they distribute the responsibility of customer interaction among the employees. Importantly, Consultancy Inc. empowers its employees to manage customer relationships autonomously, without micromanagement. They prioritize trust and professionalism, trusting consultants and BMs alike to represent Consultancy Inc. effectively while fostering meaningful connections with customers.

Consultancy Inc.'s customer engagement strategy is heavily centered around its consultants, recognizing their role as primary points of contact and ambassadors for the company. They believe that engaged and well-informed consultants will translate to satisfied customers. There are no general guidelines in place for the consultants, such as scheduling regular feedback meetings, but the responsibility for building customer relationships ultimately lies with the BM. They act as facilitators between consultants and customers, leveraging their knowledge of specific customer preferences to tailor interactions and ensure customer satisfaction. Despite their rapid growth and the need for streamlined onboarding processes, Consultancy Inc. remains committed to providing personalized support and guidance to its BMs to ensure their success in fostering enduring customer relationships. BMs are empowered to take ownership of customer concerns, leveraging their relationships and resources to find solutions that benefit both parties. Furthermore, the BMs try to continuously interact with the customers to ensure they are satisfied with the services provided. The character of these interactions varies as the BMs try to give their customers a tailored experience, by giving them the opportunity to meet in-person, online or over the phone. This collaborative approach not only strengthens customer relationships but also reinforces Consultancy Inc.'s reputation as a reliable and trustworthy partner.

4.1.3 Customer Journey

The primary focus of Consultancy Inc.'s customer engagement lies in the project initiation process. This approach emphasizes the importance of setting clear objectives and understanding customer needs and requirements.

Consultancy Inc. recognizes the importance of understanding the entire customer journey, from initial contact to ongoing engagement. They acknowledge that the process varies for each customer and may involve multiple interactions and touchpoints. Consultancy Inc. understands that the customer journey encompasses various stages, such as the initial point of contact, consultation, service delivery, and post-service follow-up. They emphasize the need to identify and prioritize key interactions within each stage to ensure a seamless and satisfactory experience for their clients.

Consultancy Inc. expresses concern about the effectiveness of their current approach in mapping and analyzing the customer journey. They highlight challenges in accurately capturing and interpreting customer experiences, particularly in a dynamic and evolving business environment. Consultancy Inc. acknowledges the need for a more comprehensive and nuanced understanding of the customer journey to address specific pain points, anticipate future needs, and enhance overall satisfaction.

4.2 Insights on Improving CX by CX Expert

The CX Expert provided insights on initiatives to understand and improve CX and customer relationship management in a consultancy firm. The CX Expert highlighted the importance of mapping the customer journeys and understanding key touchpoints in fostering long-term relationships. In addition to that, practical guidance on methodology and strategies to manage this were discussed.

The CX Expert recommends having interviews with customers and the management team, to understand current CX and identify areas for improvement. The impact of both qualitative and quantitative data on reaching meaningful conclusions was discussed. According to CX Expert, one of the most used metrics for measuring CX is NPS because this has proven to be correlated to customer loyalty and profitability. CX Expert recommends analyzing NPS data over time to understand the performance historically and where there are gaps that could potentially leverage CX by focusing on continuous improvements. Beyond NPS, other metrics like customer effort score and share of wallet were touched upon, highlighting their relevance in understanding and enhancing CX.

4.3 Customer Relationship A

This section delves into the relationship between Consultancy Inc. and Customer A, drawing insights from interviews with Customer A and the responsible Business Manager B (BM B).

During the latest survey in Q3 2023, Customer A provided a NPS of 9 out of 10, coupled by the following feedback, “In my experience, we have good collaboration and close dialogue regarding needs and the progress of the assignment. I have nothing to add regarding our collaboration other than that it meets the needs I have to a very good level”.

4.3.1 Customer A’s Perspective

Customer A has been a customer of Consultancy Inc. for approximately two years, since the relationship started in April 2022. Despite this relatively short period, Customer A expresses that they have a positive and sustained business with a mixture of formal and informal relationships and interactions with consultants and BMs. Customer A’s overall experience with Consultancy Inc. is described as generally positive, emphasizing the effectiveness of the collaboration and the desired outcomes. However, challenges related to the initial contract format have been pointed out, leading to some difficulties on their behalf that are not linked to Consultancy Inc.’s performance.

One significant concern is the turnover of consultants in projects, leading to increased onboarding efforts and workflow disruptions. Customer A suspects that this turnover may be influenced by factors such as contractual arrangements and organizational dynamics. According to Customer A this creates some level of uncertainty for them. However, Customer A puts a lot of effort into creating clearer guidelines and expectations for new consultants to facilitate the onboarding phase by providing structured materials, outlining roles and responsibilities, and organizational processes.

Customer A points out that the transition from the work-package consultant system to the headcount consultant system is a strategic decision that Consultancy Inc. is a part of as they supply consultants. What separates these two systems is that the headcount system integrates consultants into the company so that they essentially become part of the company which is the case for Consultancy Inc. as their consultants cover different positions at their customer locations. The work-package system, however, utilizes consulting services as an external resource with clear deliverables that are

expected to be handed over at the end of a project. Customer A states that the work-package has legal and other drawbacks which means that the currently adopted headcount system is more aligned with their evolving needs and long-term objectives. Customer A has experienced that this transition enabled them to have an improved collaboration with consultancy firms such as Consultancy Inc. and made the integration of consultants more seamless as structured onboarding can be developed.

Furthermore, Customer A discusses the importance of consultant selection criteria, emphasizing the importance of both technical competence and cultural fit within the organization. They acknowledge the challenges of balancing different skill sets and personalities within the team, thus they highlight the importance of alignment between consultants and their organizational dynamics and values. This was exemplified by stating that although the consultants might possess the desired knowledge and experience for the project, the projects are conducted in teams, meaning that integration into the team becomes an important criterion. Customer A states that it is not always the most experienced consultants that prove to be the best match, but rather the ones that can easily integrate into the organization while still maintaining sufficient skills to perform the required tasks.

In essence, Customer A views the communication between themselves and Consultancy Inc. as great and especially highlights the regular face-to-face meetings and the open dialogue. Customer A argues that this combination of communication channels enables the relationship to develop to a point where both parties can be more relaxed in their communication when openly discussing consultant performance and similar topics. However, some areas of improvements that were suggested by Customer A are related to administrative processes such as invoicing and contract management.

Regarding the feedback mechanism, Customer A describes Consultancy Inc.'s' use of NPS for gathering customers' feedback as a decent tool but argues that it should be complemented with additional feedback channels. They emphasize the importance of personal communication in situations where issues arise unexpectedly, which is an aspect that Consultancy Inc. have proven to be good at. Overall, Customer A notes that Consultancy Inc. is responsive to feedback that has been addressed, by proactively considering the feedback.

In terms of the relationship status between Customer A and Consultancy Inc., some factors have been highlighted as key components of their relationship such as trust, transparency, and long-term planning. It is appreciated by Customer A that Consultancy Inc. has incorporated a proactive approach to understanding the needs of the organization and provide timely support, contributing to repeat business.

4.3.2 From the Perspective of Business Manager B

BM (B) states that Consultancy Inc. maintains a strong and enduring relationship with customer A. One case that was highlighted was when a newly assigned consultant faced challenges in meeting Customer A's expectations. BM (B) acted and replaced the consultant with a more suitable candidate. BM (B) states that this proactive approach not only resolved the issue but strengthened the relationship. Frequent communication channels such as face-to-face interactions, phone calls, and text messages make this collaboration strong according to BM (B). Both parties actively engage in dialogue, indicating mutual satisfaction with the relationship. BM (B) states that Customer A exhibits a willingness to take the lead by starting the dialogue and actively engaging in conversations relating to the price and the quality of the consultant services.

4.4 Customer Relationship B

This section delves into the relationship between Consultancy Inc. and Customer B, drawing insights from interviews with Customer B and BM B. During the latest survey in Q3 2023, Customer B provided a NPS of 6 out of 10, coupled by the following feedback, “In my case, there wasn't really the seniority that was desired, but it may also have depended on how my requirements were formulated.”

4.4.1 Customer B’s Perspective

Customer B's overall experience with Consultancy Inc. is generally described as positive. This experience stems from Consultancy Inc's ability to efficiently provide consultants promptly, especially in urgent recruitment needs. This rapid response and ability to fulfill staffing needs allows on-time solutions without going through typical traditional hiring processes requiring more effort and time. Customer B argues that Consultancy Inc's ability to deliver competent consultants in a fast manner is one of their greatest advantages and strengths.

In assessing Consultancy Inc.'s performance, Customer B emphasized the importance of consultants' competences and capabilities over other factors such as sales processes or communication. Despite having experienced some minor challenges with consultants' suitability, Customer B expressed satisfaction with Consultancy Inc. On the other hand, Customer B acknowledged that their own understanding of organizational needs plays a significant role in evaluating consultants' suitability, meaning that Consultancy Inc is not necessarily at fault in case of a mismatch, as they have no way of knowing how a suitable candidate looks like without a proper description. Customer B states that for Consultancy Inc. to provide consultants that can satisfy the needs of their customers, they need to have a thorough understanding of exactly what their customers are looking for. In turn this requires increased effort from both Customer B and Consultancy Inc.

Customer B perceives the initial interactions during the recruitment process as the most critical. The interactions could vary depending on the project and for some projects it was more limited, but the key touchpoint is initial contact with the potential consultants. Moreover, they emphasize that the critical factor influencing their experience with Consultancy Inc. was the extent to which the consultants aligned with their organization's requirements. For example, the consultants must be able to live up to the pre-determined demands. Customer B states that these demands can include knowledge about different software and platforms.

Regarding communication with Consultancy Inc., Customer B has a positive view and is expressing it as effective and proactive. This is mainly due to the high degree of communication, including face-to-face meetings and regular checkups. However, Customer B states that there is room for improvements in transparency, especially regarding consultants' competencies. They suggest that clearer communication

regarding candidates' skill sets, and a more substantiated consultant profile could enhance the overall experience. Due to the nature of Consultancy Inc's offering being consulting services, Customer B believes it is crucial that these services live up to the set expectations. Furthermore, Customer B describes Consultancy Inc's current way of capturing feedback as sufficient but suggests having more structured follow-up processes in place to evaluate consultant performance during active projects.

Lastly, Customer B highlighted some factors that are important for them to foster and build long-term relationships, such as trust, transparency, and continuity in communication. According to Customer B, Consultancy Inc. has made an active effort to maintain the relationship at a good level, but simultaneously further initiatives should be taken to strengthen the relationships even further. One proposal of such initiatives is to enhance consultant support by continuous follow-up to ensure that the consultants have the necessary resources and guidance to perform in their roles. Another proposal is to conduct more rigorous reference checks to ensure the consultants' quality and reliability for specific roles to mitigate any risks of them not being able to meet the needs of the customers.

4.4.2 From the Perspective of Business Manager B

BM (B) states that in contrast to Customer A, the relationship with Customer B presents a different dynamic characterized by sporadic communication and limited engagement. Although BM B recognizes the specific requirements of Customer B, their communication is occasional and infrequent, mostly centered around quarterly meetings. While pricing negotiations were smooth, the lack of communication can come in the way of the depth of their relationship and is something that BM (B) means can be improved by new initiatives. BM (B) added that it is Customer B that has requested sporadic communication with limited engagement.

4.5 Customer Relationship C

This section delves into the relationship between Consultancy Inc. and Customer C, drawing insights from interviews with Customer C and the responsible Business

Manager A (BM A). During the latest survey in Q3 2023, Customer C provided a NPS of 8 out of 10, coupled by the following feedback, “Can often deliver staff quickly.”

4.5.1 Customer C’s Perspective

Currently, Customer C has made in total two deals with Consultancy Inc. since their relationship started in 2022. Customer C describes Consultancy Inc. as reliable and states that they view the relationship as satisfactory. Key aspects that were highlighted were Consultancy Inc.’s responsiveness and agility in addressing their needs and requirements. Throughout their relationship, Customer C also acknowledges a consistent standard of service, emphasizing Consultancy Inc.'s reliability as a consulting partner rather than simply a supplier.

When evaluating Consultancy Inc.’s contribution to Customer C’s organization, they emphasize the importance of their consultancy services. They praise Consultancy Inc.'s ability to remain flexible by having a varied pool of consultants, but also their ability to identify and present suitable consultants. These strengths remove the burden of talent acquisition internally by Customer C because it is outsourced to Consultancy Inc. Due to the varied pool of consultants Customer C states that they were presented with multiple options that align with their needs.

Customer C points out several critical interactions with Consultancy Inc. These include initial consultations, candidate selection procedures, and ongoing project discussions. Also, Customer C identifies the BMs at Consultancy Inc. as facilitators in these interactions, highlighting the importance of personalized engagement in fostering customer satisfaction. There are some critical factors influencing them positively during the interactions, including understanding their organization and requirements, relevant recommendations of consultants and the proactive communication efforts that Consultancy Inc. adopts by frequently interacting with Customer C, even after a purchase has been made. Additionally, they mention the importance of trust and transparency in nurturing collaborations and building long-term relationships, which Consultancy Inc. has delivered on.

Even though Customer C rates communication as generally good, they state that there is still room for improvement. While acknowledging the adequacy of communication frequency, they suggest more frequent face-to-face interactions. Customer C perceives on-site visits as encouraging to relationship building and issue resolution. Thus, advocating for a combination of digital and physical meetings to enhance their experience.

Regarding feedback mechanisms, Customer C appreciates the existing channels, including NPS and direct contact with the BMs. They also appreciate that Consultancy Inc. is receptive to feedback and is fast to come up with resolutions for issues. When issues appear, Consultancy Inc. addresses these and acts accordingly for a resolution that satisfies them. According to Customer C, they have established a good relationship that is based on trust and mutual comprehension.

4.5.2 From the Perspective of Business Manager A

Regarding Customer C, BM (A) characterizes the relationship as engaging and constructive, marked by good dialogues. Similar to the experiences of other customers, BM (A) feels that there is open communication about a variety of topics. BM (A) and Customer C have bi-monthly reviews to ensure continuous alignment and address any issues that may arise. The frequency of these reviews was decided by Customer C.

4.6 Customer Relationship D

This section delves into the relationship between Consultancy Inc. and Customer D, drawing insights from interviews with Customer D and BM (B). During the latest survey in Q3 2023, Customer D provided a NPS of 10 out of 10, coupled by the following feedback, “Very satisfied with consultants and work performed. And not least, BM is very professional, fast, efficient, and flexible handling. Always 100% delivery of what is promised! Thank you! It's easy to work with Consultancy Inc. Everything goes quickly and efficiently, while the consultants are very good. Top rating.”

4.6.1 Customer D's Perspective

Customer D has been a customer of Consultancy Inc. for approximately 6 years. The relationship started 2018 and since then they have always had at least one consultant employed from Consultancy Inc. Customer D have had a positive experience throughout their relationships, largely due to the consultant's performance and Consultancy Inc.'s ability to always deliver consultants that meet expectations. Customer D emphasizes the importance of having the right candidates in place, which Consultancy Inc. has proven capable of doing by delivering consultants with relevant skills. Customer D states that the current pool of consultants in combination with a variety in seniority has allowed them to consistently meet expectations and offer their consulting services at varying levels ranging from junior positions to senior ones.

According to Customer D, there is one minor concern they have experienced, which is the consultants' lack of brand recognition. They emphasize that it's crucial that Consultancy Inc. and its consultants understand Customer D's organization and structure. Thus, this complex organizational structure poses challenges in establishing a coherent company culture, culture fit and shared vision among all employees. For consultants to seamlessly integrate into the company, Customer D states that "they simply must have a sufficient understanding of how things are done at our company".

In terms of communication, Customer D describes it as effective, which has contributed significantly to the overall experience. Both consultants and BMs have been responsive and adaptable to their requirements. Customer D points out that there are clear and defined communication channels such as face-to-face meetings, phone calls, email etcetera, which also allow for leaving feedback in multiple manners. These aspects are appreciated by Customer D and serve to further strengthen their relationship with Consultancy Inc. Lastly Customer D also highlighted that they have mutual trust and can have a transparent and open dialogue in all types of scenarios, even when concerns arise.

4.6.2 From the Perspective of Business Manager B

Regarding Customer D, BM (B) expresses a sense of positive collaboration, resulting in a mutually beneficial relationship. Regular face-to-face meetings and team discussions foster a smooth flow of communication. For instance, BM (B) and Customer D frequently have online meetings to discuss project updates and address any emerging issues. According to BM (B), Customer D is satisfied with the competent consultants provided by Consultancy Inc., leading to seamless contract extensions. Notably, negotiations on price changes are straightforward, meaning that agreements are efficiently made. For instance, one time when a change in project scope was demanded which required adjustments of prices, the parties reached a consensus without the need for a negotiation.

4.7 Customer Relationship E

This section delves into the relationship between Consultancy Inc. and Customer E, drawing insights from interviews with Customer E and BM (A). During the latest survey in Q3 2023, Customer D did not answer the NPS survey.

4.7.1 Customer E's Perspective

Customer E started their relationship with Consultancy Inc. about two and a half years ago and has since expressed satisfaction with the collaboration's positive and cooperative nature. They highlighted three key aspects that they are satisfied with, and which were essential in their decision to continue in this relationship. Firstly, Consultancy Inc.'s ability to quickly match suitable candidates to their needs, which underscores their efficiency in navigating the recruitment process, even though they follow the same recruitment process as when hiring for permanent positions, "Our recruitment process with the candidates aligned closely with standard permanent recruitment processes but is faster when it comes to sourcing and onboarding them". They also mention that the proposed candidates not only possess the right skills but also are simply a good fit for their organizational culture. Secondly, Consultancy

Inc.'s ability to promptly respond to their requests, mobilize resources, and speed up project initiation has been critical in enabling Customer E's organization to meet its operational objectives efficiently. Thirdly, they have developed personal dialogue over time, which makes them stand out among the rival consulting firms as they seek to interact to a much larger degree. According to Customer E, Consultancy Inc.'s focus is on establishing plausible interpersonal relationships, creating open channels of communication, and making sure that concerns and issues are responded to appropriately. This approach has affected their experience positively since they feel that they have reached a high level of trust and transparency.

One aspect that has impacted their experience negatively is the fact that when a consultant terminates the engagements unexpectedly, leaving the businesses' projects in a state of uncertainty but also affecting the reliability of the collaboration. Customer E has several experiences of consultants leaving in advance of completion of the contract due to more attractive project openings. This has yielded difficulties in proceeding with and managing a disrupted project. These unforeseen exits not only impact project continuity but also incur additional expenses as the replacement of a consultant needs to be onboarded, which requires time and resources.

Customer E is dissatisfied with the feedback mechanism and communication, particularly during project execution. They highlight that the level of follow-up interaction after project initiation decreases significantly. Though recognizing the effectiveness and of pre-engagement communication, Customer E calls for a more frequent and proactive approach during projects. They express that the current feedback mechanism is not sufficient as it is partly reliant on NPS surveys, which from their point of view are not effective in creating the necessary dialogue. Furthermore, it impacts their ability to provide timely feedback and address any gaps or issues. This reflection can be seen when Customer E refuses to see the usefulness of NPS surveys, describing it as "worthless" and therefore showing that there is a need for more effective ways of giving feedback.

From the perspective of relationship-building, Customer E noted that Consultancy Inc. is taking initiatives aimed at fostering long-term relationships such as regularly asking for feedback and quickly responding to it. Even though Consultancy Inc.

delivers services properly and conducts personal talks, Customer E states that Consultancy Inc. is not proactive enough in understanding the organization's changing requirements and long-term needs. For instance, Customer E expresses a desire for deeper discussions on future skill demands and strategic alignment, signaling a need for Consultancy Inc. to be more forward-thinking about relationship building. Moreover, Customer E emphasizes the role of cross-functional interdepartmental communication. There are ongoing discussions within the organization among the various departments concerning promoting Consultancy Inc. to their own colleagues. Customer E has various sites internationally and has suggested that Consultancy Inc. could expand beyond their Sweden office by becoming actively involved regionally and engaging with stakeholders across different departments within the company to strengthen its presence and relationships.

4.7.2 From the Perspective of Business Manager A

Regarding Customer E, BM (A) states that the relationship is robust and operates at a healthy balance of personal and professional interaction. At the request of Customer E, there are monthly follow-up meetings between the customer and BM (A) to discuss projects and consultants. BM (A) notes that Consultancy Inc. has several skilled consultants at Customer E. Furthermore, Customer E ranks as one of Consultancy Inc.'s most significant customers in Sweden measured by the number of consultants hired.

4.8 Insights on Dissatisfied Customers from Business Manager A's Perspective

The interview with BM (A) at Consultancy Inc. revealed challenges faced by the company in satisfying customer needs and providing great CX. During the interview, several key areas were highlighted such as communication, personality clashes between consultants and customers as well as strategies for managing dissatisfied customers.

One of the most significant issues highlighted in the interview regarding CX was the role of communication. BM (A) stated that dissatisfied customers often cite poor communication as their reason for dissatisfaction. BM (A) discussed multiple instances where poor communication led to customer dissatisfaction. One such example referenced a company that needed consulting services to change their production layout. In this case the deliverables were not deemed to have satisfied the customer's needs at first, which boiled down to lack of communication between Consultancy Inc. and the customer. BM (A) stated that the customer was satisfied with the competence and performance of the consultant but due to unclear objectives and lack of communication between the parties, the results initially differed from what the customer had in mind. Furthermore BM (A) stated that after further communication and planning, the project was extended and ultimately led to satisfactory results.

BM (A) states that communication needs to be open and transparent between Consultancy Inc. and their customers to accurately address the customer's needs. This includes all channels of communication and is not only limited to BMs. Consultants, for instance, communicate daily with the customers and therefore serve as another channel of communication. BM (A) believes more preparations and customized communication based on customer preference would serve to overcome issues related to miscommunication or lack of communication. Some customers expect weekly follow-ups while others would rather have them scheduled quarterly. BM (A) believes that adapting to the customers helps Consultancy Inc provide a better experience due to customers appreciating the flexibility in communication and feedback mechanisms. BM (A) does underline the importance of feedback that can be analyzed such as NPS as this type of feedback makes it easier to track progress of CX efforts.

Another area highlighted by BM (A) was the critical role of consultant-customer compatibility. BM (A) stated that their consultants tend to live up to customers' expectations in terms of competence but there are cases where clashing personalities led to dissatisfaction for either the customers or the consultants. BM (A) exemplifies this by discussing how a customer recently was dissatisfied with a consultant because of his personality, which made it hard to integrate the consultant into the team,

although the customer stated that he was exceptional in terms of technical competence.

Consultancy Inc. proactively seeks to address dissatisfied customers. This is achieved by having regular contact with the customers and taking quick action when necessary. BM (A) gives one example of where a consultant was swiftly replaced on a project due to alarms from the customer about unprofessional behavior.

BM (A) highlighted issues in some internal processes of Consultancy Inc. related to documentation and information management. BM (A) emphasizes that documenting interactions and feedback from customers is crucial to gain an accurate perspective of the customers' perception. Furthermore, it enables conversations to be revisited to satisfy customer needs and make sure they are accurately understood. BM (A) states that subsequently, there is a need for standardized processes to ensure consistency when documenting and acting on feedback from customers. BM (A) explains that there are currently no standardized ways of working in terms of documenting customer conversations and feedback as most BMs slightly differ in their approach which can lead to disadvantages. Examples of disadvantages with improper documentation is that whenever a new BM becomes responsible for a customer, they have got to learn everything about the customer on their own due to lack of historical data. Consultancy Inc. have ongoing implementations aimed at streamlining information management processes which BM (A) believes will be beneficial and improve CX. BM (A) underlines the importance of addressing customer feedback which starts with understanding and documenting the feedback.

BM (A) explains that due to the current lack of formal structure, BMs have free reign to operate independently which BM (A) believes allows them to build personal and close relationships with customers. These relationships are crucial for long-term success and need to be nurtured. BM (A) subsequently believes that Consultancy Inc. would benefit from implementing internal training sessions and guidelines to establish more structured processes and develop the capabilities of employees that are responsible for CX. BM (A) supports the idea of implementing training sessions for BMs aimed at improving their understanding of CX and how to handle scenarios they might face with dissatisfied customers which would also allow for the exchanging of

ideas. These training sessions do not have to be limited to CX but rather their responsibilities to advance BMs in their professional development. Furthermore, consultants are another group that BM (A) believes would benefit from similar training sessions as they interact with customers daily. It would be useful to encourage and educate consultants about how to improve customer perception of Consultancy Inc. BM (A) also stresses the importance of communication between consultants and BMs so that their views of excellent CX aligns.

4.9 Insights on Dissatisfied Customers from Business Manager B's Perspective

The interview with BM (B) from Consultancy Inc. revealed several reasons for customer dissatisfaction and challenges in managing customer relationships. A main reason was a mismatch between customer expectations and the competence of the consultants. BM (B) also discussed multiple areas of improvement and provided suggestions of how to improve CX.

In general, the main reason for customer dissatisfaction stems from customers' perception of consultant's competences and capabilities. Customers have expressed dissatisfaction by stating that consultants do not possess sufficient knowledge to manage the work, meaning that they lack the required competences for a particular role. Customers reported instances where consultants oversold their abilities during initial interviews but failed to deliver on expectations during the project. For example, in one case, the consultant who had worked strategically faced difficulty shifting to an operational role, despite the consultant confirming the customer's expectations during the initial qualification meeting. Due to how the consultant presented their abilities, the customer had high expectations and had already planned how to integrate the consultant into the organization which led to the plans having to be revised. Subsequently the customer expressed dissatisfaction due to the consultant overselling his abilities.

BM (B) believes that whenever there is a misalignment between consultant expectations and the customer's expectations, the risk of dissatisfaction on either side significantly increases. An example given was that a consultant who was overqualified for a role was promised increased responsibility by a customer for partaking in a project. About one year after, the consultant was dissatisfied and felt as if his professional development had halted, which led to the consultant requesting to be reassigned to another project rather than extending the current contract. In turn this led to the customer being dissatisfied as they had expected the consultant to stay long-term. BM (B) stresses that these cases showcase the importance of alignment of consultant and customer expectations to reach satisfactory results.

When it comes to building effective customer relationships, BM (B) has faced various challenges. One challenge BM (B) mentions is the lack of communication standards within the organization and with customers. There are no distinct communication processes and policies implemented, which is causing difficulties in maintaining a consistent level of communication. According to BM (B), this inconsistency in communication when delivering services may affect brand perception negatively. In cases where consultants experienced problems in establishing effective communication channels with customers, misunderstanding and dissatisfaction are more prevalent.

Moreover, BM (B) states that inconsistencies also appear due to a lack of standardized procedures, which contributes to inefficiencies in project management and customer engagement. Therefore, one suggestion expressed is implementing standardized training programs for consultants to improve their skills in communication, conflict resolution, and customer management. Another aspect that is being mentioned is that the onboarding processes for consultants are inadequate in terms of making them better at communicating since they are those who will have daily contact with the customer. Thus, developing clear onboarding processes for consultants to ensure they are adequately prepared for their roles and responsibilities would be promising, according to BM (B). Furthermore, BM (B) stated that training sessions could potentially be useful to educate BMs as they work closely with customers and hence contribute to CX. Although one might have to differentiate training sessions aimed at BMs and consultants to accurately reflect their role and responsibilities, BM (B) believes that these options should be explored to increase CX.

BM (B) raised concerns about the usefulness of NPS as a measure of customer satisfaction. NPS surveys are conducted regularly; however, customers have expressed that they found the timing to be too static, hence the need to assess real-time feedback methods. BM (B) also stated that there is a need to create more formal approaches to generate actions that might address customer feedback and implement improvement projects. BM (B) believes that enhancing internal systems for tracking feedback and implementing improvement initiatives would lead to a better understanding of customer needs and a more effective way to manage arising

concerns. Further, BM (B) argues that regular feedback could be achieved by establishing structured communication channels between BMs, consultants, and customers.

5. Analysis

The following analysis delves into the three main themes of the thesis, namely customer experience (CX), customer experience management (CXM) and customer relationship management (CRM). Following the analytical model introduced in section 2.5, the analysis is divided into five subsections. The first subsection, 5.1, examines the current state of Consultancy Inc. Subsection 5.2 discusses how Consultancy Inc. perceives and approaches its customers, highlighting the company's customer-centric strategies. Subsection 5.3 explores the factors that are impacting CX. The fourth subsection, 5.4, assesses the management of CX, focusing on the metrics and tools used to gauge and enhance customer experience. Finally, subsection 5.5 delves into CRM, analyzing the factors that influence customer relationships and their development. Each subsection aims to evaluate different aspects of the company's operations to provide comprehensive insights that support the strategic recommendations in chapter 6.

5.1 As-is Analysis of Customer Experience at Consultancy Inc.

The following section aims to analyze the current state at Consultancy Inc. by applying concepts described in the theoretical framework. Firstly, an as-is analysis will be presented based on the first four steps described by Van Gelder (2023).

1. CX-Maturity Assessment

The first step of the CX-maturity assessment is divided into eight elements, starting off with *Vision, Targets and Strategy*, Consultancy Inc. has defined their aspirations by stating that they are committed to reaching a 30% response rate on their NPS surveys along with a score of 75. The empirical data indicates inconsistencies in how these aspirations are communicated across the firm. As expressed by BMs and the OEG manager, lack of structure and standardization of managing documentation as well as staff training, both in terms of consultants and BMs, results in a need to review the current way of working. The second element is *Market and Customer Insight*, and the only currently used way of capturing these insights is through the NPS surveys sent out twice a year. This is complemented by interactions between

BMs and customers aimed at gathering customer feedback. However, these interactions are not done in a structured manner, meaning there are differences depending on how the BMs work as well as how frequently the customers wish to interact.

Customer Lifecycle Management is the third element and although Consultancy Inc. has defined customer journey stages, they are not currently integrating these stages into operational processes. The previously mentioned lack of formal structure of capturing customer insights makes it hard to track and manage customers over time as specific interactions and feedback risk being neglected.

The *Communication* element has received varied responses from the interviews conducted. Although some customers appreciate monthly or weekly checkups with BMs, there are still those that prefer quarterly follow-ups. Furthermore, there are multiple communication channels that are appreciated to different degrees depending on customer preference such as digital meetings and face-to-face meetings. In essence, it becomes important to identify what communication channels and frequency of communication is suitable for each customer. It should be noted that consultants are the ones interacting with customers the most as their projects are on-site, which means they are a vital part of the communication element.

Regarding *Offerings and Services*, they are generally well received by customers. In rare cases, as described by BM (B), customers are dissatisfied with the performance of consultants that may have oversold their abilities during qualifications meetings (QMs). Meanwhile BM (A) states that this rarely occurs but that miscommunication about expectations may result in the customers expecting something else than what they receive. According to the customers interviewed, the competence of consultants plays a pivotal role in how they view Consultancy Inc. since they represent the company and make up the company's service offering, which is in line with Krejci's (2022), highlighting consultant competence as instrumental for building long-lasting relationships.

For the *Way of Working* element, Consultancy Inc. employs a decentralized approach that allows for a high level of flexibility. Due to BMs and consultants being able to communicate with customers as they see fit, they can be flexible and personal in their approach, which some customers appreciate. This autonomy, while allowing for flexibility, personalization and quick adaptation to customer needs, often leads to a lack of standardization and structure across the organization which means that there is a lack of cohesion in delivering a unified CX. Considering this lack of cohesion and standardization, differences in service and communication quality are more likely to occur, which can be the reason that BM (A) and BM (B) have differing opinions regarding the main reason for customer dissatisfaction.

Switching to a centralized model on the other hand risks losing out on the advantages of the currently utilized decentralized approach.

Tools is another element in the CX-maturity assessment and the main tool for gathering customer feedback is the NPS surveys. Staff at Consultancy Inc. and some customers have argued that there is a need for improving and diversifying the feedback mechanisms. The surveys are limited to providing real-time customer insights as they are only sent out twice a year. Consultancy Inc. utilizes the CRM system Salesforce, which can allow advanced analytics and more detailed tracking of customer interactions and satisfaction. This requires BMs to continuously enter sufficient and detailed information about customers. The OEG manager claimed that entering accurate documentation in Salesforce is the responsibility of BMs but there is no established structure of real-time tracking and management of customer interactions and feedback. On the other hand, establishing such a structure might be difficult unless the reasoning for the changes is clearly communicated to staff beforehand.

The last element is *Follow-up and Analyses*, which is closely related to *Tools*. It is evident that the existing mechanisms for follow-up do not accurately capture changes in customer expectations or satisfaction in real-time. Both BM (A) and BM (B) express that Consultancy Inc. would benefit from improving the collection and storage of feedback. This aligns with the *active/close monitoring of satisfaction* factor outlined by Karantinou and Hogg (2007), allowing organizations to gain a deeper

understanding of how different initiatives affect CX. The extent and frequency of satisfaction assessments such as the NPS survey or follow-up meetings can have a considerable influence on how effectively the organization can adjust their CX strategies based on feedback. Real-time feedback mechanisms would subsequently allow for better responsiveness than periodic surveys such as NPS surveys that may fail to identify ongoing issues. The need to improve real-time feedback mechanisms has also been highlighted in interviews by staff and customers alike, which indicates that Consultancy Inc. would benefit from improvements in this area. It is important to note that responsiveness to feedback is critical as monitoring is only as useful as the actions taken in response to insights gained. The customers interviewed are satisfied with how Consultancy Inc. response to feedback. Some of the customers state that they would like to interact with BMs more frequently during projects as they feel like the current contact is heavily centered around project initiation and finish. The consensus of the customers and staff of Consultancy Inc. is that they are well equipped and excel at responding to feedback provided by customers. Furthermore, the OEG manager believes there is great potential in improving proactive efforts.

2. CX-Vision and Roadmap

Consultancy Inc. has a CX-vision tied to their desired NPS score of 75, however this score has only been reached once throughout the last eight surveys and had an answer frequency of 14%. The OEG manager claims that although initiatives to improve CX are implemented continuously, Consultancy Inc. has no detailed roadmap of how to reach their vision. One example of an initiative implemented due to Customer D's request was a specific time reporting system for consultants so the customer could track the consultants' working hours the same way as their regular employees. Staff at Consultancy Inc. stated that a roadmap detailing milestones and responsibilities could be beneficial as it would ensure accountability. Examples of initiatives that were discussed for the roadmap are specific training sessions to improve CX for both BMs and consultants as well as technological investments to better capture real-time feedback.

3. Customer Journeys and Touchpoints

Some customer journeys and touchpoints are already mapped by Consultancy Inc., based on information about their sales process. However, this mapping is not comprehensive enough to be used to evaluate each touchpoint. As stated in section 2.2.6, the study focuses on the last three stages of the customer journey and associated touchpoints, namely the **purchase stage**, the **retention stage**, and the **advocacy stage**.

The **purchase stage** is a critical moment in the customer journey, which means that for Consultancy Inc., this stage likely has critical touchpoints. These touchpoints have high potential to improve CX if addressed. One such touchpoint is *Consultant Competence Matching*. The empirical material highlights the importance of matching the right consultant with the customer demand to achieve high customer satisfaction. A customer sends a request for a consultant matching their requirements where the responsible BM sends consultant profiles to the customer so they can assess which candidates are most relevant for the request. After evaluating the candidates, the customer requests a QM with the most suitable candidates. As stated by BM (B), a mismatch between consultant competencies and customer requirements is the most prevalent reason for customer dissatisfaction and risk negatively impacting the customers' view of Consultancy Inc.'s reliability. There have been cases where a relationship could be recovered after a mismatch, for instance, by replacing the consultant. However, this mismatch still impacts customer perception, meaning that matching the right consultant with the expectations of customers is crucial for establishing and maintaining good customer relationships.

Another touchpoint is *Consultant-customer Alignment*. An interesting aspect to consider for this touchpoint is mismatches due to competences and personality clashes. As exemplified by BM (A), a customer was recently dissatisfied with a consultant due to his personality clashing with the customer's team as they had differing working styles. The consultant preferred upfront communication and was direct when addressing other team members, which some interpreted as harsh. Currently, qualifications meetings are the only form of direct interaction a consultant and a customer have before the start of a project, which increases the risk of a mismatch due to inadequate interactions. This showcases that the alignment of values

and work culture between Consultancy Inc's' and their customers play an important role in enhancing the relationship. In line with this, Krejci (2022) identifies culture fit as a success factor for improving customer relationships. The customers and BMs interviewed also highlighted culture fit as an essential determinant to finalize the recruitment process and employ a consultant. The customer stated that the consultant was exceptional in terms of technical competence but differences in personality made him hard to integrate into the team. The customer provided this feedback to the responsible BM and requested a change of consultant that matches them better. Therefore, a mismatch between consultants and the customer's workplace culture can create tension and dissatisfaction, affecting the overall CX.

Another touchpoint in the purchasing stage is the *Clarity and Transparency of Service Agreements*. Following QMs, Consultancy Inc. sends brief one-page reports summarizing the topics discussed. This one-pager aims to streamline the decision-making process by providing clarity and transparency, which has historically been appreciated by customers. Customers need to understand what they are purchasing including deliverables, timelines and costs. Therefore, Consultancy Inc.'s ability to provide clear and transparent agreements that they can deliver on becomes vital. Note that this touchpoint, although important, is not likely to have a great impact on CX if focused on by Consultancy Inc. due to customers expressing that they are already satisfied with the company's transparency. Resources therefore might be more effectively spent on improving other touchpoints; however, this touchpoint should not be compromised to avoid backlashes.

The next stage is the **retention stage** that focuses on maintaining and enhancing the relationship between Consultancy Inc. and their customers. Firstly, an identified touchpoint is *Ongoing Support and Problem Resolution*. This touchpoint refers to the ability of Consultancy Inc. to provide ongoing support, whether for issues regarding consultancy services, billing inquiries etcetera. As highlighted in interviews, there are customers that wish to have more contact with Consultancy Inc. during projects. The reason is that it would help to quickly identify potential issues. How quickly and efficiently the company resolves issues subsequently becomes important for customer satisfaction and CX and therefore check-ins have become an important part of this

touchpoint as it ensures that customers feel valued and supported. Another touchpoint in the retention stage is *Quality of Deliverables and Service Consistency*. The quality of the consultant's work needs to consistently remain high to ensure customer satisfaction. Inconsistencies in consultant performance or project outcomes can have a severe negative impact on CX and potentially lead to churn, which makes this touchpoint critical. Multiple interviews showed that customers are satisfied with the quality of deliverables and service consistency of Consultancy Inc. The firm attribute their success in this touchpoint to their efforts to attract the best talent and letting them play an active role in choosing projects that they find interesting. The BMs believe this motivates the consultants to perform to the best of their abilities, which ensures service consistency.

The next stage is the **advocacy stage** where satisfied customers become promoters of the company by recommending it to others and potentially vouching for the service. The first identified touchpoint in this stage is *Customer Satisfaction Assessments and Feedback Solicitation*. Consultancy Inc. currently tracks customer satisfaction using follow-ups and NPS. If the organization becomes better at engaging customers to share their experiences and satisfaction levels, potential advocates can be identified and encouraged to advocate for Consultancy Inc. to others by word of mouth, leaving reviews etcetera. Furthermore, how and when Consultancy Inc. solicits feedback can greatly influence how likely customers are to advocate for the company. Due to the current lack of structure regarding customer satisfaction assessments and feedback solicitation, this touchpoint can be considered critical and in need of improvement. Consultancy Inc. should secure feedback efficiently, and even more important is utilizing it for improvement. The second identified touchpoint related to the advocacy stage is *Community Engagement*. Consultancy Inc. does not hold events and gatherings aimed at engaging with customers besides the occasional work-related face-to-face meeting between a BM and the customer. Building a community around the service offering, for instance, through social media and events can make customers feel valued and make them more inclined to advocate on Consultancy Inc.'s behalf. The OEG manager said consultants are encouraged to bring customers to social events such as 'after work', yet this rarely happens.

4. Identify the Most Critical Customer Journeys and Touchpoints

The analysis above highlights critical touchpoints in the purchase, retention and advocacy stages. Three critical touchpoints were identified in the purchasing stage: *Consultant Competence Matching*, *Consultant-customer Alignment*, and *Clarity and Transparency of Service Agreements*. The critical touchpoints identified in the retention stage are *Ongoing Support and Problem Resolution* and *Quality of Deliverables and Service Consistency* due to their impact on CX. For the final advocacy stage, the identified critical touchpoint is *Customer Satisfaction Assessments and Feedback Solicitation*. These identified touchpoints serve as the groundwork for the CX improvement initiatives suggested in section 7.

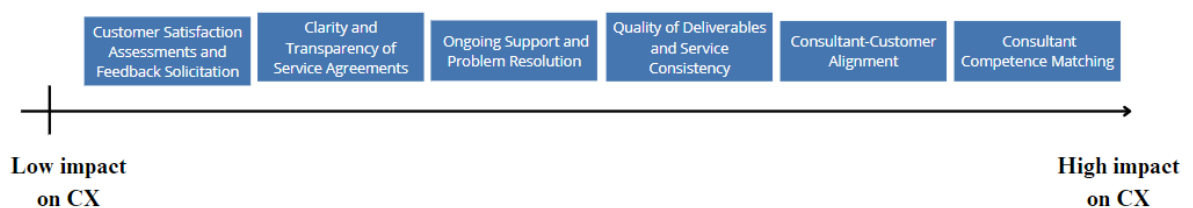


Figure 7. Categorization of the different touchpoints ranked based on their impact on CX.

5.2 Consultancy Inc.'s Perspective on Customers

The following section analyzes the CX at Consultancy Inc. by utilizing the service-centered approach presented in the theoretical framework and applying these theories to the empirical material. Furthermore, the theories regarding customer focus and leadership are discussed ending with an analysis of customer value at Consultancy Inc.

Consultancy Inc. delivers tailored solutions to their customers by engaging all stakeholders in service creation to realize the value of the service in the eye of the customer. This method is in line with Vargo and Lusch (2004) and Normann and Ramirez (1993) theories about a customer focused approach. Currently, Consultancy

Inc. views their customers as targets rather than coproducers, which is hindering optimal outcomes when offering customized solutions. For example, Consultancy Inc. tries to identify future customer needs internally rather than including customers in the processes. In accordance with Davis and Manrodt (1996), organizations can gain more from changing their view of the customer to coproducer, as it can lead to improved customer perception. If done correctly this may enable customer relationships to develop from transactional to collaborative relationships.

Consultancy Inc. employs a customer focus approach, meaning that their business revolves around prioritizing customer needs and expectations. Gupta (2023) states that this approach leads to high customer satisfaction and long-term relationships. Morgan (2023) states that a customer leadership approach impacts the CX even more since this approach goes beyond customer focus. For Consultancy Inc., applying a customer leadership approach would mean that they need to actively exceed expectations rather than just meet customer needs and requirements. The customer leadership approach embodies and promotes a culture that places customer needs and expectations at the forefront of business strategy to exceed customer expectations. Although this approach may have more CX-related benefits than a customer focus approach, it is more resource demanding as it requires gathering more in-depth customer insights. For a firm with a customer base of 100-200 customers like Consultancy Inc, these insights are difficult to analyze, and it is challenging to gather insights about all the customers. For instance, customers might have different expectations and needs, which makes it hard to exceed the expectations of all customers. This becomes even harder for a large customer base as it generates many expectations and needs.

5.3 Factors Influencing Customer Experience at Consultancy Inc.

To examine CX at Consultancy Inc. further, it is important to analyze the elements affecting it. One factor highlighted by Gupta and Vajic (2000) is *customer*

satisfaction, which is closely related to aligning what has been promised with what is delivered. Based on the interviews, customers value the responsiveness and expertise of consultants highly. However, satisfaction is influenced negatively by inconsistency in service delivery, or when consultant capabilities do not align well with project needs and requirements. The NPS provides a quantitative measure of customer satisfaction but fails to capture how satisfaction evolves throughout the project since it is only performed every six months. For instance, while a customer may report satisfaction at the end of a project, NPS does not show if they have been frustrated or if challenges appeared during the project. This is because satisfaction is not static and can fluctuate based on multiple factors. For example, initial satisfaction might be high due to effective sales processes and promising consulting services but could decrease if the execution phase involves miscommunications or inadequate problem-solving capabilities. The NPS survey also risks missing specific aspects of customer satisfaction if the customer decides to answer the survey without an explanation of their score.

Lemke et al. (2006) highlight another important factor which is *continuously reviewing that customers are satisfied* which range from proactive reviews to reactive reviews. This factor facilitates continued alignment with customer needs, which also helps to identify areas of improvement. As mentioned, Consultancy Inc.'s current feedback mechanism is based on NPS surveys sent out biannually indicating that reviews are conducted proactively, which is clearly not sufficient for capturing ongoing experiences during the six-month period. It is evident that more continuous and dynamic review mechanisms can provide more timely and actionable insights although it will be more time consuming.

Another factor highlighted by Lemke et al. (2006) refers to *the degree to which a firm understands its customers' needs*, which directly correlates with how effectively they can deliver valuable solutions. For instance, Customer B states that for Consultancy Inc. to provide consultants that can satisfy the needs of their customers, they need to have a thorough understanding of exactly what their customer's needs are. However, it requires increased effort from Consultancy Inc. to understand the needs of their

customers to a higher degree. Hence, it is of high importance to continually assess and address customer needs as these can evolve over time. Consultancy Inc. currently have a static approach to CX through their use of NPS. However, understanding both the initial and changing needs provides a dynamic and accurate view. Customers have pointed out that their experience can change throughout a project which makes it important to view CX as a dynamic measure to avoid misinterpretations and confusion.

Perceived value, which is a factor mentioned by Al-Maamari and Abdulrab (2017), which encompasses more than evaluating cost against benefits. According to MutiaSobihah et al. (2015), perceived value encompasses customer assessments of service quality, which are identified as a primary factor influencing customer loyalty. Moreover, perceived value is influenced by multiple factors such as the user-friendliness of platforms, the approachability and responsiveness of consultants and BMs. For example, if a consultant shows genuine interest and autonomy in their work, customers are most likely to value the service more. Consultancy Inc.'s customers assess value not only for the project's outcomes but also for how the outcomes were achieved. Furthermore, if a consultant provides insights into future industry trends and innovative solutions for upcoming challenges, this will most likely translate into an improved perception of the consultancy services offered by Consultancy Inc.

Another factor presented by Lemke et al. (2006) relates to *the extent of personal contact between a company and its customer*. This includes the simplicity of communication, formal and informal engagements and proactive service delivery that fulfill customer needs. Personal contact at Consultancy Inc. ranges from face-to-face meetings and direct phone calls to more impersonal methods such as emails and automated customer service systems. The different methods are employed to different extents depending on the responsible BM and customer. In a context like Consultancy Inc. the degree of personal contact can significantly determine the quality of the CX. This is apparent from the feedback which shows that some customers prefer direct

interactions with BMs, while others may perceive the company's communication as too infrequent or impersonal. In a B2B context where the services provided are complex and intangible, a high level of personal contact can be necessary to get a better understanding of customer needs. However, as stated by interviewed customers and BMs, too much contact without a clear purpose can be perceived as exaggerated and tedious, which can negatively affect CX.

5.4 Customer Experience Management Metrics and Tools at Consultancy Inc.

It is evident that Consultancy Inc. are limited in their use of metrics related to CXM such as CSAT, CES, and CLV, since the only metric used is NPS and although it provides a snapshot, it fails to capture the complexity of CX throughout the customer journey. Customer E even goes as far as calling NPS a useless metric, which is why this customer ignores the surveys. Therefore, there is most likely a lot of value to gain from combining NPS with other metrics and qualitative feedback from customers. The challenges lie in systematically integrating the received feedback and transforming it into continuous service improvement, which again stresses the importance of consistency in feedback solicitation. Moreover, it is crucial that relevant metrics are used to improve CXM and go beyond resolving existing identified issues. However, if the metrics are used for the wrong purpose or not managed correctly, Consultancy Inc. risks undermining its efforts to enhance CX.

McKinsey (2022) argues that the impact of customer satisfaction on loyalty is highly influenced by CX. Consequently, Consultancy Inc. may benefit from viewing customer satisfaction and CX as intertwined areas for loyalty. The company does not currently track customer satisfaction with tools such as CSAT, showing that this may be an area of improvement. Allan et al. (2020) and Bloomberg (2009) state that customer satisfaction and loyalty are linked through an asymmetric relationship, meaning that loyal customers are satisfied or lack alternatives, but satisfied customers are not necessarily loyal which means implementing CSAT is not a guarantee of

improving CX. By combining more relevant metrics to their current way of working, they can become more proactive, which Lemke et al. (2006) highlight as beneficial.

5.5 Factors Influencing Customer Relationship Management at Consultancy Inc.

The following section analyzes factors influencing CRM at Consultancy Inc. based on two frameworks, the first one refers to evaluating long-term relationships at consultancy firms and the second one refers to the mechanism needed to build collaborative relationships for consultancy firms. These factors play a significant role in shaping customer relationships.

As mentioned by Al-Maamari and Abdulrab (2017), *trust* is one of the six important factors for loyalty. According to the interviewed customers loyalty is built over several interactions and can be significantly impacted by first impressions, ongoing reliability, and Consultancy Inc.'s adherence to commitments. According to Krejci (2022), trust is significantly correlated to experiences involving solving concerns or issues, which was evident in the case where Customer D requested a specific time management system. Trust is a fundamental aspect of a relationship as highlighted by multiple customers during the interviews. As consultants gain access to potentially sensitive information when becoming part of the customers' organization, this aspect becomes essential. Furthermore, customers have pointed out that they place a lot of value on the trust they have in the BMs as well as in the consultants. Therefore, trust is an attribute that can significantly impact customer relationships at Consultancy Inc. Subsequently, situations that damage the established trust such as discrepancies or failure to meet expectations can greatly impact long-term relationships which take time to rebuild.

Boonstra (2023) argues that *collaboration* is a fundamental factor that fosters strong ties with customers, and this factor is not limited to working cooperatively internally but also to engaging with customers in a cooperative manner. A collaborative approach ensures that solutions are co-created and more likely to be well received by all parties involved, which enhances effectiveness and acceptance of CX initiatives.

The involvement of customers in CX initiatives becomes an indicator of how deeply the collaboration principle is embedded in an organization. This involvement can take various forms, such as idea generation, iterative feedback loops, and involvement in the decision-making process. The OEG manager gave an example of an idea that originated from customer input, being newsletters. Consultancy Inc. have not yet implemented these newsletters but are investigating the idea to determine if it would help to improve CX and how it should be implemented.

Krejci (2022), highlights the factor of *clear communication*, which Consultancy Inc.'s customers believe is crucial to make sure both parties are aligned regarding expectations and deliverables. Miscommunication can lead to dissatisfaction, which, for example, was highlighted by BM (A) to be the main cause of dissatisfaction amongst customers. The study showed that some customers would appreciate more communication from Consultancy Inc. Other customers thought the communication worked well. Hence, this discrepancy points to the fact that there is room for improvement. Notably, BM (B) does not believe communication to be a cause of dissatisfaction. The different opinions of the interviewed BMs may be attributed to differences in their working styles. However, it may also be attributed to variation amongst their customers as they are responsible for different customers with varying needs and expectations.

Personal relationships are a success factor emphasized by Karantinou and Hogg (2007). This factor involves personal relationships that are deeper and more meaningful than professional interactions, including broader perspectives such as understanding of business concerns, personal working styles, and personal lives. As described by the BMs, their approach to customers varies, where some interactions with customers are highly customized which they attribute to higher satisfaction and customer value. However, there needs to be a balance between professional and personal interactions to maintain professionalism and respect customer boundaries.

The last factor, *Continuity of Contact, Consistency, and Personal Attention*, refers to the degree of continuity, consistency, and personalization of an interaction with a customer (Karantinou and Hogg, 2007). This factor is crucial for Consultancy Inc. to

adhere to, in order to maintain and develop long-term relationships, since these determinants are key to making customers feel valued. This is in line with the *Relationship management* attribute presented by Krejci (2022), regarding constantly adapting to changing customer needs. These aspects also ensure that they are responsive to the customer's needs, which enhances the overall CX throughout their engagement. Consultancy Inc. does not have an established method of ensuring regular updates and check-ins with customers. However, this is possible with their CRM system, which the BMs are acquainted with and utilize, but it requires historical interaction to be documented accurately.

As previously mentioned, this would require establishing clear guidelines related to documentation. Consistency in the quality of contact, the level of personal attention given to each customer and continuity of contact will vary due to customers' different preferences regarding how and when ideal interactions should take place. For instance, Customer B has a positive view of continuous contact, consistency and personal attention in their relationship with Consultancy Inc. Furthermore, the customer describes the relationship as effective and proactive due to the regular checkups and face-to-face meetings. Customer C, however, states that there is room for improvement such as more frequent face-to-face meetings. These examples showcase how customers have different needs.

5.6 The Stages of Customer Relationships at Consultancy Inc.

To get a deeper understanding of Consultancy Inc.'s customer relationships and how they develop over time, the analysis uses the model by Ford et al. (1998). The analysis focuses on the two last relationship stages, the developing stage and the stable stages. These stages represent the maturity of relationships where concerns and uncertainties are resolved, and relationships start to solidify and yield mutual benefits. Each relationship is analyzed based on the following factors: *trust and commitment*, *learning*, *investment*, and *adaptation*.

In the developing stage, the relationship incrementally gets stronger as both parties gain a deeper understanding of each other's capabilities, expectations, and ways of

working. Based on the interviews, the developing stage is critical for Consultancy Inc. since it is in this stage where it is determined whether the relationship will progress to the stable stage. According to Ford et al. (1998) the developing stage is when a relationship is developing and business is flourishing, for instance by repeat business. Based on the case study, all the interviewed customers purchased more than one consultancy service on different occasions, meaning that they have decided to continue with their relationship. This means that the five analyzed customer relationships (A – E) are either in the developing stage or in the stable stage, or in between, with some transitioning from the developing stage into the stable stage.

Customer B describes Consultancy Inc.'s way of capturing feedback as "sufficient" rather than great due to not having follow-up processes that evaluate consultant performance during projects. In terms of the learning factor, Customer B and Consultancy Inc. are still in the process of understanding each other's needs, expectations, and working dynamics, indicating a stage of early exploration and adjustment. Regarding investment, while both parties have made initial commitments there may be room for further investment in terms of time and resources to strengthen the relationship. Additionally, adaptation is crucial as Customer B has raised multiple topics that need to be addressed, suggesting that both parties need to adapt their approaches and processes to better align with each other's expectations and requirements. Customer B states that Consultancy Inc. have made efforts to strengthen the relationship but that further measures are desirable such as more rigorous background checks of consultants' experience and abilities to ensure that they can meet customer requirements. Customer B also argued that a more substantiated consultant profile could enhance the overall experience as it provides more clarity and transparency. The customer highlighted trust, transparency, and continuity in communication as important factors for building long-lasting relationships. Due to the customers' current view of Consultancy Inc., improvements are needed to push them into the stable stage. All this together points to the fact that Customer B can be considered a customer in the developing stage.

Customer C describes their relationship with Consultancy Inc. as an established good relationship based on trust and commitment. The customer believes that trust and

mutual understanding are key determinants of fostering collaboration and long-lasting relationships, indicating that the prerequisites for a relationship in the stable stage are fulfilled. Furthermore, considering the investment factor, both parties have made initial investments in terms of time, resources, and effort to establish the foundation of their relationship, yet there are opportunities for further investment to deepen the collaboration. The customer has suggestions for improvements such as more frequent face-to-face meetings with BM (A). Based on the learning factor, Customer C and Consultancy Inc. are still in the process of understanding each other's preferences, working styles, and capabilities. Additionally, regarding adaptation, while there is evidence of initial adaptation to each other's needs and requirements, further adjustments are necessary to progress the relationship progresses towards the stable stage. Moreover, the customer and Consultancy Inc. have only completed two deals in total, making it reasonable to categorize Customer C in the development stage as the parties are still getting acquainted and the relationship is developing, although it seems to be transitioning to the stable stage.

Customer E appreciates the efforts of Consultancy Inc. in creating open channels of communication and making sure that concerns are heard and addressed, indicating a positive aspect of trust and commitment. Customer E claims there was a case where a consultant abruptly ended their project before the project came to completion, which negatively impacted on their view of Consultancy Inc. in terms of reliability, hence there is a need to regain trust. Rebuilding trust is crucial for advancing the relationship, emphasizing the significance of trust and commitment as a foundational element. Furthermore, Customer E's expression of overall satisfaction with the relationship highlights the importance of continued learning and adaptation. By actively seeking ways to enhance collaboration and address challenges, both parties can learn and grow together, strengthening the relationship over time. Another aspect Customer E is dissatisfied with is the feedback mechanisms and communication during projects. The customer would like Consultancy Inc. to improve these factors to gain a better understanding of the customer's needs. These aspects will enhance Consultancy Inc.'s understanding of Customer E's needs, facilitating their transition to

a more mature stage of the relationship. In terms of investment, Customer E's willingness to offer suggestions for improvement demonstrates their investment in the relationship's success. This collaborative approach signifies a commitment to mutual growth and development, which is essential for building a strong relationship. Overall, this places Customer E in the developing stage.

The final phase of Ford et al. (1998) model, the *stable*, represents the peak of relationship development, where there is a high level of trust, and commitment. Following the interviews, some customers have reached this stage, such as Customer D, where they state that “We have had a positive experience throughout the 6 years collaboration, we have mutual trust and can have a transparent and open dialogue”. It is marked by deep integration and often involves strategic relationships where Consultancy Inc. and its customers work toward common long-term goals. Customer D has had a positive experience throughout the entire relationship that is based on trust, transparency, and open dialogue even when concerns arise. This indicates a high level of trust and commitment, which are crucial factors in the stable stage of a relationship. Customer D believes these are the reasons for the relationship's development and hopes to continue the relationship the same way. Additionally, adaptation is key to maintaining the relationship's positive development. The only concern raised by the customer is the consultants' lack of brand recognition, as they want consultants to be familiar with the company before partaking in a project, which the customer believes Consultancy Inc. will manage to improve. This indicates a need for Consultancy Inc. to adapt their processes, such as improving the consultants' familiarity with the customer's company, to better meet the customer's expectations and ensure continued success in the relationship. In terms of learning, as expressed by Customer D, the relationship can be strengthened by Consultancy Inc.'s' learning about their evolving needs and discussing future skill demands and strategic alignment. This suggests an ongoing process of learning and adaptation to ensure that the relationship remains relevant and beneficial for both parties. Regarding investment, both Customer D and Consultancy Inc. can benefit from investing in long-term initiatives that can yield substantial mutual gains. This could include initiatives aimed at network expansion, skill development, and increased retention.

Customer A can be considered to have entered the stable stage as off recently. The customer previously raised concerns regarding how consultants can be replaced at short notice, which creates small uncertainty, increased onboarding efforts, and workflow disruptions. These concerns stem from the high turnover of consultants that may leave for different purposes, for example another more attractive opportunity or due to other arrangements and organizational dynamics. Regarding investment, Consultancy Inc. have invested resources in addressing the concerns raised by Customer A, such as implementing measures to reduce consultant turnover and improve continuity in service delivery. This investment has likely contributed to the relationship's stability. Consultancy Inc. embraced the concerns of Customer A, leading to the relationship evolving to a stable stage. Customer A stated, "In my experience, we have good collaboration and close dialogue regarding needs and the progress of the assignment. I have nothing to add regarding our collaboration other than that it meets the needs I have to a very good level", which is corroborated by BM (B). In terms of learning, both Customer A and Consultancy Inc. have adapted to address concerns and improve collaboration. This ongoing learning process has contributed to the relationship's advancement to the stable stage. Additionally, adaptation has played a crucial role in the relationship's development. Consultancy Inc. adapted its approach to address Customer A's concerns, demonstrating flexibility and responsiveness to customer needs, which has strengthened the relationship and led to its recent transition to the stable stage.

In principle, Consultancy Inc. employs the same strategies regardless of the customer to improve its relationships. As stated by Geraldles et al. (2018), a specific personal relationship with a customer cannot be copied and applied to other customers. Therefore, there is a need for Consultancy Inc. to recognize the need to adapt its relationship management strategies depending on the stage of the customer relationship and the unique context of each customer. This is showcased in Karantinou and Hogg's (2007) findings regarding the mechanisms for enhancing relationships management in consultancy firms. One of these mechanisms concerns the fact that *different handling is required at different stages of a customer*

relationship. This could include regular review and renewal strategies for ongoing relationships and possibly renewal efforts for relationships at risk of stagnation. Another perspective of not recognizing the importance of approaching customers based on stage of a relationship is the learnings from previous interactions. There are risks that may arise if, for instance, Consultancy Inc. does not emphasize learning from previous interactions. This can lead to relationships degrading due to customers feeling that their needs are not being adequately met. Furthermore, customers may feel that Consultancy Inc. is not adapting to project progressions, causing them to lose trust and commitment. Therefore, it is evident that active and careful management, a mechanism in Karantinou and Hogg's (2007) framework, is essential for ensuring that Consultancy Inc. proactively addresses customer demands. This approach is crucial to enhancing customer relationship management, rather than merely reacting, as is currently most often the case.

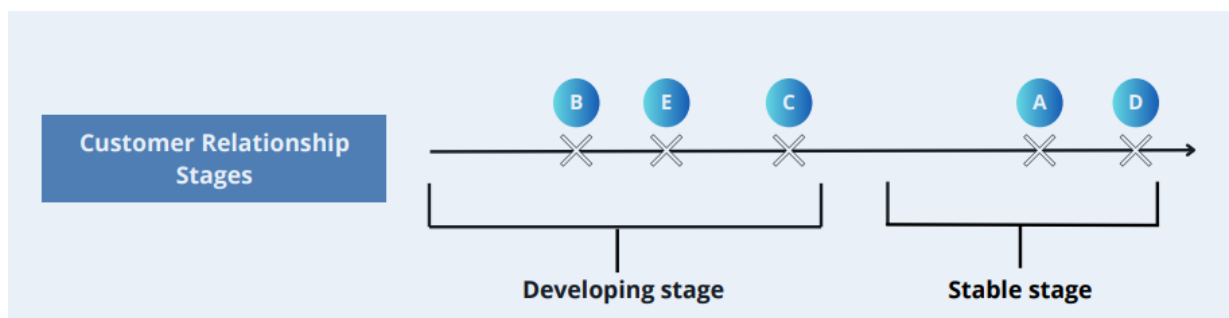


Figure 8. outlines the stage of the customer relationship of Customer A-E.

6. Conclusion

In addressing the research questions posed in this study, we have gained insights into the current state of customer experience and customer relationship management practices at Consultancy Inc. By delving into the aspects of customer relationships, factors influencing customer experience, and strategies for fostering long-lasting customer relationships, we have identified areas for improvement and proposed actionable initiatives to enhance Consultancy Inc.'s approach to customer experience.

RQ1: How are customer relationships assessed?

The assessment of customer relationships at Consultancy Inc. showed that the KPI used is the traditional metric Net Promoter Score (NPS) that is data-driven. Alongside that, Business Managers manage personalized interactions to understand and assess their customers. These interactions are assessed without data-driven feedback mechanisms. This approach enables Consultancy Inc. to gain insights into customer preferences, despite the lack of comprehensive data analytics. The integration of customer feedback into strategic decision-making processes, although limited to NPS and personalized interactions, allows Consultancy Inc. to tailor its offerings to meet customer needs. However, it is evident that while Consultancy Inc. employs a combination of quantitative and qualitative approaches, there is room for improvement in diversifying feedback mechanisms. The existing strategy emphasizes the potential for enhanced data-driven insights to further refine Consultancy Inc.'s customer leadership approach.

RQ2: What are the key factors influencing customer experience in the current way of working?

Moving on to the key factors influencing customer experience at Consultancy Inc., it is evident that effective communication strategies, personalized interactions, and proactive customer engagement initiatives are important as they influence customer perceptions and customer satisfaction. By prioritizing transparent and clear communication channels, Consultancy Inc. has been able to build trust and credibility with its customers. In addition to these factors, the study also highlights the importance of competent consultants as a key factor influencing customer experience.

Customers value the expertise and capabilities of consultants highly, and their alignment with project needs subsequently becomes crucial. Understanding and addressing changing customer needs is fundamental for providing valuable solutions and maintaining a dynamic view of customer experience. Moreover, factors such as perceived value and personal contact between the company and customers significantly impact the quality of customer experience at Consultancy Inc.

RQ3: What strategies can be implemented to develop long-lasting relationships with existing and potential customers?

The study identified several strategies that Consultancy Inc. can implement to develop long-lasting relationships with both existing and potential customers. These strategies are outlined in the next section (section.7).

7. Recommendation

Based on the analysis, the recommendations presented below were formulated.

□ Implement tailored feedback mechanisms that enhance real-time feedback
Consultancy Inc. should implement real-time feedback tools that capture customer feedback accurately and efficiently. This enables the firm to identify and address concerns that may otherwise go unnoticed. Furthermore, it makes Consultancy Inc. better equipped at adapting to evolving customer needs and requirements. Proactive efforts that capture customer feedback helps Consultancy Inc. stay ahead of customer expectations, which can increase satisfaction and loyalty. One metric that can be implemented to complement the NPS survey is CSAT. This metric provides immediate feedback from customers that could help Consultancy Inc. to identify concerns. Furthermore, it is straightforward and simple to understand, which allows for accurate tracking of performance over time. Additionally, identifying areas of improvement as soon as they arise facilitates the development and implementation of CX initiatives.

Consultancy Inc. should create a concise survey with relevant questions such as “How satisfied are you with our consultancy services” followed by a scale and textbox, as these questions allow for benchmarking how customer satisfaction evolves over time. The CSAT survey should be modified depending on the purpose it should fulfill, for instance if the survey is sent out right after a purchase it should evaluate customer satisfaction regarding the sales process. Consultancy Inc. should consider sending these surveys after each review meeting, which allows the BMs to encourage the customers to answer the surveys before the end of the meeting.

- Develop structured review meetings for the initial, execution and closure phases of a project

As highlighted by interviewees, there is sometimes a mismatch between how frequently customers expect follow ups and how often they are scheduled by BMs. Furthermore, both BM (A) and BM (B) highlight that customers themselves decide how often these follow-ups should take place. This disconnect can be avoided by

implementing periodic review meetings as an established procedure, aimed at fostering open communication and collaboration. Furthermore, it allows Consultancy Inc. to promptly identify concerns rather than letting issues remain unattended until follow-ups that are scheduled further down the line. As highlighted in interviews, there are customers that believe that the communication factor is lacking during projects while it is more frequent before project initiation and completion. Therefore, Consultancy Inc. should have a brief review meeting every two months during the execution phase regardless of the project's duration. Besides that, review meetings should also be scheduled during project initiation and completion as Consultancy Inc. needs to make use of the communication they have with customers. This allows Consultancy Inc. to gain measurable insights that can be used to evaluate the progression of a customer relationship and compare the progressions across multiple customer relationships. By systematically evaluating project outcomes and customer feedback, Consultancy Inc. can identify areas for improvement and enhance service delivery.

□ Accurate documentation in CRM system

Establish clear guidelines and protocols for BMs on how to accurately enter relevant customer information into Salesforce. Providing training and resources on data entry best practices will ensure that the data is relevant, consistent, and actionable for informed decision-making and personalized customer interactions. Salesforce is not currently used to its fullest extent resulting in the loss of valuable insights for enhancing CX and driving growth. Subsequently, it should be investigated how to utilize the CRM system to gain deeper insights into CX.

□ Invest in a training program

A mandatory training program should be implemented to enhance the CX skills and communication strategies of staff. Consultancy Inc. should pre-record training sessions that staff can access at their convenience as it may otherwise interfere with on-going projects. The goal is to equip staff with the necessary tools and knowledge to deliver exceptional CX to foster long-term relationships with customers. The program should cover areas that are relevant to improving CX, such as improving

communication skills, behaving professionally and brand advocacy, and ensuring that all training aligns with improving the overall customer experience. Making these sessions mandatory will ensure skill development among staff, standardize best practice, and consistency in service delivery.

□ Corporate Events, Workshops, and Seminars for Customers

Consultancy Inc. prides itself on having competent consultants and it is crucial when offering consulting services. The company does, however, not currently offer customers participation in corporate events, workshops, and seminars aimed at enhancing the overall CX. By organizing engaging and informative events, Consultancy Inc. can expand their networking opportunities and receive insights that can be used to add value to customer relationships. These events can serve as avenues for building stronger connections, fostering collaboration, and showcasing Consultancy Inc.'s expertise, ultimately contributing to a more interactive CX.

□ Develop a detailed CX-roadmap by identifying important touchpoints

Consultancy Inc. would benefit from establishing a comprehensive roadmap that defines specific milestones and responsibilities related to improving CX. Defining clear objectives and timelines allows the firm to align its initiatives with their desired NPS score and long-term vision, while also ensuring accountability. To achieve this, Consultancy Inc. must identify all touchpoints throughout the customer journey and prioritize those that significantly impact the CX, rather than focusing solely on the touchpoints within the purchase, retention and advocacy stages, as highlighted in this thesis. If, for instance, Consultancy Inc. decides to implement CSAT, the roadmap should detail who is responsible for the implementation, including deadlines, milestones, and objectives.

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9. Appendix

9.1 Interview questions for customers

Overall Experience:

- How would you describe your overall experience with Consultancy Inc.?
- In what ways has Consultancy Inc. added value to your organization? Concretize
- What are the different touchpoints you have with Consultancy Inc., and which ones are the most critical ones?
- What factors had an impact on your experience or during the touchpoints? (sale process, onboarding, consultants' capabilities and competences, Business manager, communication, relationships)
- In what areas does Consultancy Inc. provide satisfactory customer experience? What factors are the most important and why?
- In what areas does Consultancy Inc. provide dis-satisfactory customer experience? What factors are the least important and why?
- In what areas do you feel that Consultancy Inc. could improve in terms of customer experience?
- What are potential dealbreakers and why?

Interactions and Communication:

- How would you rate (Bad-sufficient-good) the effectiveness of Consultancy Inc. communication with your organization and why?
- What makes Consultancy Inc. good in communication? (ex. Transparency, frequency, availability)
- Which area concerning communications can be improved at Consultancy Inc. and how?

Feedback Mechanisms:

- How are you able to leave feedback? (NPS, BM contact, talks with consultants)
- How do you perceive how you provide feedback to Consultancy Inc.?
- How does Consultancy Inc. respond to your feedback?
- What are any additional feedback channels or processes you would find beneficial?

Long-term Relationship Building:

- What factors contributed to your decision to continue working with Consultancy Inc.? (Trust, transparency, managing relationships continuously, consistency & competence)
- How do you perceive the level of trust and partnership between your organization and Consultancy Inc.?
- What is Consultancy Inc. good at when it comes to creating a long-term relationship?
- What are areas of improvement to establish long-term relationships?
- Are there any initiatives or strategies you believe would strengthen the business relationships between your organization and Consultancy Inc.?

9.2 NPS template

cNPS - Client Net Promoter Score

We appreciate you taking the time to answer the question below. It is of great value to us in our continued development and collaboration.

1. Your name
2. Company name
3. How likely are you to recommend Consultancy Inc. to a colleague or someone else in your network?
 1 2 3 4 5 6 7 8 9 10
4. Do you have any feedback you would like to share with us? Please provide it below:

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