

Customer Relationship Case Study Profile

Customer: Third National Bank
 Location: West Chester, PA
 Contact: William Smith, Manager - Operations
 Phone: (555) 555-1000
 Date: February 24, 2003

A. General Customer Background

Customer Demographic Categories	Response
Length of time personally involved with the system/software	4 years
Number of units presently installed at the respondent's facility	2 units
Vertical Customer/Market Segment	Bank/Financial

B. General Product Evaluation Factors

General Product Evaluation Factors	Perceived Product Importance	Perceived Product Performance	Gap
Importance/Performance of the System (i.e., equipment, software, services, professional services, consulting, training, etc.) to the organization's (or facility's) day-to-day operations	4 (very important)	3 (just as expected)	- (1)

C. Primary Sources of Service And Support

Primary Sources of Service and Support	Response
Primary source of telephone technical service and support	Manufacturer-Direct (i.e., National Systems, Inc.)
Primary source of on-site service and support	Manufacturer-Direct * (i.e., National Systems, Inc.)

* "Every once in a while, they [i.e., the Manufacturer] can't come out after hours, or on the weekend. In these cases, we're forced to call a third party - usually Pennsylvania Bank Services Associates out of West Chester. Lately, this has been happening more often, and that's a problem!"

Customer: Third National Bank
 Location: West Chester, PA
 Contact: William Smith, Manager - Operations
 Phone: (555) 555-1000
 Date: February 24, 2003

D. Product-Related Evaluation Factors

Product-Related Evaluation Factors	Perceived Importance	Perceived Vendor Performance	Gap
Hardware quality and reliability	5	3	-(2)
Software quality and reliability	5	4	-(1)
System functionality	4	3	-(1)

State-of- 4 3 -
 the-art (1)
 technology

Ease of daily system start-up
 4
 3
 -(1)

Ease of system use
 4
 3

-(1)			
Cost of the system hardware and software	4	2	-(2)
Reputation of the manufacturer	4	3	-(1)

Rating Scale:

Importance: 5 Absolutely essential
 4 Very important
 3 Somewhat important
 2 Somewhat unimportant
 1 Not important at all

Performance: 5 Much better than required
 4 Better than required
 3 Just as required

- 2 Worse than required
- 1 Much worse than required

Customer: Third National Bank

Location: West Chester, PA

Contact: William Smith, Manager - Operations

Phone: (555) 555-1000

Date: February 24, 2003

E. Service and Support-Related Evaluation Factors

Service and Support-Related Evaluation Factors	Perceived Importance	Perceived Performance	Gap
Quality of user training	5	3	-(2)
Quality of system documentation	5	3	-(2)
Quality of telephone technical support staff	4	3	-(1)
Professionalism of telephone technical support staff	4	3	-(1)
Product knowledge of telephone technical support staff	5	3	-(2)
Quality of on-site engineers	4	3	-(1)
Professionalism of on-site engineers	4	3	-(1)
Product knowledge of on-site engineers	4	3	-(1)
Ability of service engineer to get spare parts quickly	4	1	-(3)
Availability of after-hours or weekend support	4	1	-(3)
Reputation of the service and support vendor	4	3	-(1)
Ability of the vendor to resolve problems quickly	5	2	-(3)
Following through on requests	4	3	-(1)

Rating Scale:

Importance:

5	Absolutely essential
4	Very important
3	Somewhat important
2	Somewhat unimportant
1	Not important at all

Performance:

5	Much better than required
4	Better than required
3	Just as required
2	Worse than required
1	Much worse than required

Customer: Third National Bank
 Location: West Chester, PA
 Contact: William Smith, Manager - Operations
 Phone: (555) 555-1000
 Date: February 24, 2003

F. Statements

Our service and support vendor ...	Agree/Disagree
Understands our use of the system/software	(4) Agree strongly
Is responsive to our technical service and support needs	(3) Agree somewhat
Is committed to continuous service improvement	(3) Agree somewhat
Is easy to deal with	(3) Agree somewhat
Responds to our service calls on a timely basis	(2) Disagree somewhat
Is flexible with respect to its service contract agreements	(4) Agree strongly
Helps us minimize the incidences of system downtime	(2) Disagree somewhat
Completes all of the required work to our satisfaction	(2) Disagree somewhat
Consistently meets our service expectations	(2) Disagree somewhat
Fixes the problem right the first time	(2) Disagree somewhat

Rating scale:

Agreement:

4	Agree strongly
3	Agree somewhat
2	Disagree somewhat
1	Disagree strongly

Customer: Third National Bank
 Location: West Chester, PA
 Contact: William Smith, Manager - Operations
 Phone: (555) 555-1000
 Date: February 24, 2003

G. Problem Areas/Possible Areas for Improvement

Problem Areas/Possible Areas for Improvement	How Often a Problem?
Responding to on-site service calls within the contracted time	(3) Sometimes
Responding to telephone inquiries in a timely manner	(3) Sometimes
Resolving a service problem correctly the first time	(3) Sometimes
Following through on problem resolution	(3) Sometimes
Getting a system "fix" in a timely manner	(4) Rarely
Receiving after-hours or weekend technical support	(2) Frequently
Communications with telephone technical support	(3) Sometimes
Ability to get an answer to an important question	(3) Sometimes
Service technician not having the right part readily at hand	(3) Sometimes
Prompt response for after-hours or weekend support	(1) Always

Rating scale:

Problem Frequency:

5	Never a problem
4	Rarely a problem
3	Sometimes a problem
2	Frequently a problem
1	Always a problem

Customer: Third National Bank
 Location: West Chester, PA
 Contact: William Smith, Manager - Operations
 Phone: (555) 555-1000
 Date: February 24, 2003

H. Service and Support Importance/Performance/Change

Service and Support Evaluation Factors	Response
Performance of the service and support received for our system/software	(3) Just as required
Change in level of service and support performance over the past year	(2) Worse than last year *

* "The new service tech isn't anywhere as good as the last one we had. I think he hasn't had all of the training for our particular type of equipment. He just doesn't understand what we do here as well as the guy he replaced."

Rating Scale:

Performance:

5	Much better than required
4	Better than required
3	Just as required
2	Worse than required
1	Much worse than required

Change:

5	Much better than last year
4	Better than last year
3	Same as last year
2	Worse than last year
1	Much worse than last year

I. Recommendations/Renewals

Recommendations/Renewals	Response
Likelihood of recommending our services vendor to other organizations	Yes; but with some reservations *

* "I would not recommend them if they require weekend or after-hours support. Otherwise, they're fine! I'd also tell them to make sure they get a good service tech - and get to keep him!"

Rating Scale:

Likelihood to Recommend:

- Yes; without reservations
- Yes; but with some reservations
- No; I would not recommend our vendor

Customer: Third National Bank
 Location: West Chester, PA
 Contact: William Smith, Manager - Operations
 Phone: (555) 555-1000
 Date: February 24, 2003

J. Perceptions of the Way in Which the Service Vendor Conducts its Technical Service and Support:

Perceptions of Service and Support Performance	Yes / No
Accessible	Yes
Committed	Yes
Competent	Yes
Courteous	Yes
Flexible	Yes
Helpful	Yes
Honest	Yes
Knowledgeable	Yes
Professional	Yes
Prompt	No
Quality-minded	Yes
Responsive	No
Skilled	Yes
Understanding	Yes
Willing to Listen	Yes

Customer: Third National Bank
Location: West Chester, PA
Contact: William Smith, Manager - Operations
Phone: (555) 555-1000
Date: February 24, 2003

K. Verbatim Comments

- “We’ve been using them for a long time, and they’ve generally always come through. However, they’re a little rough around the edges and there’s been no real improvement over the past year in fact, things have actually gotten a little worse!”
- “We were getting everything we needed until we expanded our coverage to include weekend and after-hours shifts. They really haven’t risen to the occasion. We have to call them two or three times to make sure they respond on the weekend. We keep leaving them messages, but we don’t always hear back. This is becoming a major problem, and we are thinking about switching vendors once our contract expires.”
- “They seem to know most of the answers to our questions, but they don’t respond very quickly. The new field tech isn’t as sharp as the last one, but he was here for over three years. We’re giving the new guy a chance, but if he doesn’t show some major improvement in the next month or so, we’re going to have to start knocking around some heads!”
- “The system is easy to use, but it breaks down every once in a while for no apparent reason - at least to us! We’re not really sure whether some of the repeat calls we have to make are due mainly to inherent product flaws or just our new service tech not knowing exactly how to assess the problem right the first time. Sometimes it takes too long for him to get the right part quickly. This leads us to believe that maybe he doesn’t really know where the problem is sometimes. This is a real problem - and it’s not getting any better!
- “We had a big problem with them last year. It’s all been fixed now, but they really got me in trouble with my supervisor. It all centered on an issue of what was ‘in’, and what was ‘not in’ our new contract. The lesson I learned is that everything I do with them - everything they promise me - has to be put in writing! If it’s in writing, they’re rock solid. But if it’s not in writing, there’s always a potential argument.”
- “They’re slow to respond on the weekends. If we make a call for service on the weekend, their phone response time is very slow. For example, we called in for service at 4:30 in the morning, but it wasn’t until 1:00 [the next day] before they came.”

Customer: Third National Bank
Location: West Chester, PA
Contact: William Smith, Manager - Operations
Phone: (555) 555-1000
Date: February 24, 2003

K. Verbatim Comments (continued)

- “They’re [i.e., the service techs] very professional and friendly, and they always try to keep on top of things. But the company’s user training and system documentation are pretty poor. As a result, we have become too dependent on their service techs, although we might want to take over some of the easy fixes ourselves to save time. However, their training and documentation has to get better before we could ever attempt to do any of that.”
- “Most of the time, they meet our service and support expectations. However, when they don’t, they really tend to fail miserably! They’re generally pretty good, but they’re certainly not consistent - especially from one service tech to the other. I guess their in-house tech training program isn’t so good. Sometimes we think we know their equipment better than some of their own techs do!”
- “When something goes wrong, there’s a lot of finger-pointing in their organization. Sometimes I think that it takes them so long to return our phone calls because they’re trying to figure out who to blame before they call us. It’s never their own fault - always someone else’s within their organization!”
- “Overall, their service and support has been okay - but some of the edge has come off over the past year. Things that we don’t complain about often enough have a tendency not to be fixed. We continuously have to complain before certain things finally get done. For example, it took me about four months of complaining before they finally took out an obviously bad unit and replaced it with one that doesn’t break down every two weeks. It’s a lot better now, but it took a great deal of constant complaining.”
- “Our annual contract comes up in about three months. I’ve been casually checking out some other vendors who are third parties - but I’m afraid to make a switch away from the manufacturer. Still, I know from some of my associates at other companies that some of these third parties provide better support on the weekends or after hours. I’ll really have to check them out before it’s too late.”

Customer: Third National Bank
 Location: West Chester, PA
 Contact: William Smith, Manager - Operations
 Phone: (555) 555-1000
 Date: February 24, 2003

L. Customer Assessment

Overview

- High importance is placed on the use of the system/software; however, customer service and support is no better than “just as required”.
- Gets both telephone and on-site tech support directly from the manufacturer. Manufacturer-direct support is basically okay on weekdays, but deficient after hours and on weekends; customer is sometimes forced to use a third party for weekend support.

Product/Service Points of Vulnerability

- Ability of service engineer to get spare parts quickly (Significant)
- Availability of after-hours or weekend support (Significant)
- Ability of the vendor to resolve problems quickly (Significant)
- Product cost, and hardware quality and reliability (Moderate)
- Quality of user training and system documentation (Moderate)
- Product knowledge of manufacturer telephone support staff (Moderate)

Potential Points of Disconnect

- Responds to service calls on a timely basis (Moderate)
- Helps to minimize incidences of downtime (Moderate)
- Completes all work to customer satisfaction (Moderate)
- Consistently meets service expectations (Moderate)
- Fixes problem right the first time (Moderate)

Existing Problem Areas

- Responding to on-site service calls within contracted time (Moderate)
- Responding to telephone inquiries in a timely manner (Moderate)
- Resolving a service problem correctly the first time (Moderate)
- Following through on problem resolution (Moderate)
- Communications with telephone technical support (Moderate)
- Ability to get an answer to an important question (Moderate)
- Service technician not having the right part readily at hand (Moderate)

Negative Performance Trends/Perception

- Technical service & support performance is perceived as “worse than last year” (Significant)
- Not believed to be either “Prompt” or “Responsive” (Significant)

Potential “Kick-Out” Factor

- Considering switching to another service and support vendor that provides better after-hours and weekend coverage (Significant)