

The Customer Experience

Top 5 ICT Providers World-Wide

1. Dell
2. SAP
3. Cisco
4. Hewlett Packard
5. EDS



Figure 4

Eight service providers receive a Telemark Gold Award for Outstanding Customer Experience overall. The top five are shown in figure 4.

Catalysts for Change

There is much rhetoric about transformation from 'technologically driven' to 'service driven' organisations, particularly as competition increases. A big catalyst for change has been customer demand for a seamless service, inter-operability and maximum connectivity between devices of all kinds, regardless of locations, particularly due to the trend towards globalisation and mobility. The boundaries of competitors have become blurred and new competition is emerging in traditional 'spaces'. The biggest catalysts for change are often triggered by the threat of losing customers, declining revenues, and an inability to attract new customers. Such threats have impacted dramatically on innovation and shifts in strategy with many network operators implementing plans to provide an Outstanding Customer Experience for solution services.

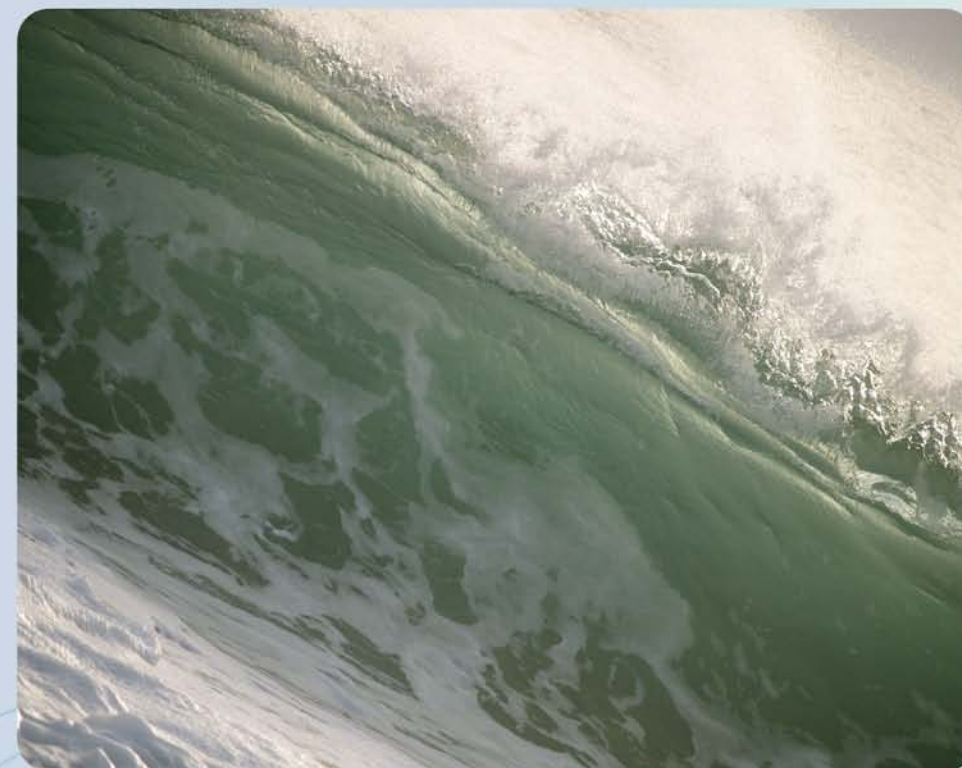
ICT is a broad subject, and so Telemark set out to identify and measure best practice irrespective of ICT product, location, tradition, or scope and depth of solutions required. Decision makers in multinational and large enterprises were interviewed about their direct experiences of dealing with ICT suppliers. ICT suppliers can be chosen from a broad range of companies, but in this report they are confined to the following groups: Computer Equipment Providers, Software Providers, Network Service Providers, Systems Integrators and Telecoms Equipment Providers.

Source: ICT Service Supremacy Preview June/2008 Issue 4



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Outstanding Customer Experience Analysis & News



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Customer Expectations

Will expectations ever be exceeded?

High levels of customer satisfaction do not imply that customer expectations are met. Yet we hear of service providers talking often about exceeding expectations. Striving to exceed customer expectations is a noble and worthy vision. It means that expectations of self and colleagues will be high and performances will be high also. It is a philosophy of stretching and making profound leaps in progress and performance, re-evaluating, measuring and reassessing, but never quite arriving. Paradoxically, in many areas, the higher the achievement, the greater the expectations so that gap remains high. Only where expectations are low are they generally exceeded.

There are several different methods available to researchers to assess expectations. At Telemark, matching questions are asked, of data network decision makers and influencers, about importance and satisfaction of 32 service attributes. Importance is ranked from most important to least. Satisfaction is measured against benchmarks from Poor to Outstanding. The Expectation Gap, which indicates how closely customer expectations are being met for the 32 service attributes, is assessed by subtracting the importance rating from the satisfaction rating. When customer satisfaction exceeds attribute importance the gap is positive. Conversely a negative gap indicates areas where satisfaction falls short of customer expectations. Using this measure expectations are exceeded in three areas: Billing in Currency of Choice, Local Language Support and Billing at Cost Centre.

Telemark's publication Great Expectations, evaluates the expectation gap, globally, by region and by sector, a useful approach to operators who are interested in evaluating a particular area of the market. The results demonstrate that regional and sector differences occur. For example, in North America and the Government sector there are at least 12 attributes which are markedly different in importance rank from Global Results.

Source: Global dataVPN
Great Expectations
May/2008 Issue 4



Global Data VPN Movement Analysis

Marked Changes: Top 3 Global Operators

Telemark's publication Global Data VPN: Movement Analysis looks at how customer satisfaction with global service providers has varied over time, overall, per category (Network Operation; Network Installation; Meeting Requirements; Customer Support; Billing and Pricing) and on 32 service attributes.

Top 3 Global Operators

The results show that since Feb 06 NTT Com has gradually worked its way up the rankings and now occupies the top position. During this time Orange Business Services has been consistently ranked in the Top 2 global performers.

Figure 2 Overall CSI – Global dataVPN

Ranking	Feb 06	Aug 06	Feb 07	Aug 07	Feb 08
1 st Operator	OBS	OBS	OBS	OBS	NTT Com
2 nd Operator	BT	BT	NTT Com	NTT Com	OBS
3 rd Operator	Telefonica	NTT Com	T-Systems	BT	BT

Source: Global dataVPN
Movement Analysis
May/2008 Issue 4

Figure 3 Overall Satisfaction Index - Trends

