



FOLLOWING UP WITH CLIENTS TO ENSURE IMPACT

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FRIDAY 15 OCTOBER 2010

Speakers:

- Ms. Susan HAIRD, Deputy Director, United Kingdom Trade and Enterprise – UKTI
- Mr. Jorge SEQUEIRA, CEO, Procomer, Costa Rica
- Mr. Cengiz TURKAY, Chief, Corporate Communications, Export Promotion Centre of Turkey (IGEME)

Moderator: Mr. Anders AEROE, Acting Deputy Executive Director, International Trade Centre

This session focused on issues covering the efficient delivery of services and the effective measurement of the impact of these services. The moderator noted that this is certainly an area of challenge, but RBM must be achieved in a meaningful way for organizations to be achieving their goals.

Ms. Susan HAIRD described United Kingdom Trade and Invest's Project Impact Measurement System (PIMS), which helps them to understand the strengths, quality and performance of their services.

The follow up with clients is achieved by; having excellent client records detailing who received what help when, where, and how; quantitative surveys of both users and non-users; more in-depth qualitative studies covering particular topics; and time series data analysis: Tracking clients' performance over time against comparison group of non-users via independent data sources.

Key findings of UKTI's client surveys were summarised. UKTI made a difference in the following key ways; overcoming barriers to new overseas business; gaining access to customers, business partners and information not otherwise available; improve profile or credibility overseas, understanding of the competitive environment and overseas marketing strategies. This enabled exporters to gain the confidence to explore or expand in an overseas market or markets.

Their research came out with the following findings regarding the benefits of their services.

- Firms of all sizes benefit from overcoming barriers to new markets, e.g. gaining access to contacts and networks not otherwise available, raising profile and credibility in a new market, overcoming legal or regulatory issues.
- Innovative SMEs most likely to benefit from learning effects, e.g. improved marketing strategy, improved products, changed behavior to up-grade approach.
- High financial impact is difficult to predict: no consistent market or profile characteristic predicts incidence of high benefits. Most are innovative SMEs at a 'tipping point' on a growth trajectory. But some large clients also report very large additional sales not achievable without UKTI help.

She concluded that, UKTI now has 5 years of consistent PIMS data, allowing robust comparison of quality and impact across services and over time. Transparent measurement has helped to drive productivity: total of 15,000 businesses helped, and £2.5bn additional profit generated 3 years ago, in 2010 that has risen to 23,600 businesses helped and £5bn additional profit now – this equals over £35bn additional exports. This model is a replicable model for following up with clients which is transferable to other TPOs.

Mr. Jorge SEQUEIRA described how PROCOMER had established an ISO 9001-2008 certified system 5 years ago for customer satisfaction evaluation which cover most of the services provided by PROCOMER. Several methods are used for evaluation depending on the service provided:

- Evaluation forms to 100% of the customers after receiving a service
- Yearly external customer satisfaction survey involving thousands of customers
- Internal semi-annual customer satisfaction surveys
- Monthly follow-up at managers' meeting and quarterly reports and action plans to work on continuous improvement

The ultimate strategic objective of PROCOMER is to establish a true customer-centric, integrated knowledge management system to follow-up on the exporter's full life cycle, as well as to optimize their communication and relationship with customers by the following means

- Developing and maintaining a single, integrated customer information database
- "Remembering" everything we learn on each interaction with our customers
- Knowing our customers and understand their specific needs to follow-up and assist them throughout the full cycle

The advantages of a centralized CRM will be that they have a centralized customer database, know and understand who their customer is, enable tailoring of services and follow-up to their needs, simplify communication, allow for targeting specific audiences based on their sector, needs & preferences. By better understanding their clients they can assist them through the full cycle.

Mr. Cengiz TURKAY described how IGEME acts under the auspices of the Undersecretary of the Ministry Foreign Trade in Turkey. It was established in 1960 as a non-Profit public organization. Its goal is to promote Turkish exports and its clients are Turkish exporters (especially SMEs).

Trade information service (TIS) was initiated in 2004, and located in their library, which is the unique library for official trade information in Turkey. This service provides standardized, classified, most up-to-date and reliable trade information in the shortest possible time period.

Evaluation has focused on IGEME's Trade Information Service. A questionnaire was sent to clients by e-mail and also placed on the web site. The questionnaire sought to understand customer needs and their opinions about IGEME's electronic trade information services. To gather information about the outcomes of current services to help planning the future projects was another goal of the survey.

They received about 400 responses and the evaluation revealed that our Trade Information Service has provided reliable information, that it is up to date as well as a rich content information source, it offers trade opportunities and has provided timely response to customers. However, the evaluation also revealed a number of areas where improvements are required for example IGEME's web site design.

As a follow up to evaluation, a number of concrete actions were undertaken by IGEME:

- The web site was redesigned in 2008 in order to meet client needs.
- The blog "IGEME Export Diary" was launched last April
- They started using Twitter (<http://twitter.com/igeme>) in August 2010 in order to reach customers via new channels
- Started a project called "Exporters' Info-line" which will be completed by end of October

KEY POINTS FROM BOTH BREAK-OUT SESSIONS

- Quality of client information and records is critical for understanding needs and performance
- Satisfaction surveys, for quantitative and qualitative results, are universally used
- Information is frequently gathered/collected immediately after interaction, but longer term follow up is valuable
- Ability to track tangible business results (certifications, export receipts) is very helpful but only some countries are able to obtain this information
- Good quality performance measurement drives performance improvement especially if organizational and staff KPIs are aligned
- Most TPO's have to respond to a range of stakeholders and are scrutinized intensively by government, audit, policy agencies etc