

e-Workshop

Total Customer Experience
(TCE) Model Building for
FINANCIAL SERVICES



(ENTERPRISE SESSION)

November 27

09:00~10:30 GMT

GOCEM

Program Description

TCE (Total Customer Experience) Model Building e-Workshop is designed to help *Marketing, Sales and Service Executives* build a TCE model to *monitor, manage, and enhance* the total customer experience across multiple channels and touch-points throughout the whole customer lifecycle. The content of this program is based on the U.S. patent-pending Branded CEM (Customer Experience Management) Method, invented by Sampson Lee, Founder of G-CEM.

Why Build a TCE Model

The TCE Model provides a number of distinctive advantages for managing customer experience – it formulates a management system that gives quantifiable metrics to monitor results; it provides a scientific approach that clearly explains the relationship between satisfaction, buying behavior and even word-of-mouth referrals; it applies sound and solid management principles to correlate customer experience and brand strategy. For the first time, you will be able to visualize how to deliver and manage an integrated and consistent Total Customer Experience (TCE) for your customers across the matrix of multiple touch-points and channels. Gain an edge with these three points of differentiation:

Quantifiable—it allows you to listen to the Voice of Customers (VOC) systematically, put customer experience data to practical use, and form a *measurable* TCE management system;

Outside-in—it gives you a different fulcrum to drive the change program of your company using an outside-in approach, through customer experience data, for a shift from product-centric to *customer-centric*; and

Effective—it creates an effective total customer experience, from which both your company (*achieving business targets*) and your target customers (*feeling more satisfied*) can benefit.

What You Will Learn

This program is composed of three components: Pre-workshop *e-Readings*, an *e-Workshop*, and *Post-workshop e-Coaching*. By the end of the program, participants will learn the following:

Understand—*understand the principles of effective TCE management*: how to create a memorable, positive, and highly differentiated experience across multiple channels and touch-points with minimum resources;

Build— *build an integrated and quantifiable TCE model*: how to map touch-points and associated channels across entire customer lifecycle, define typical customer journeys by different segments, and build a pragmatic TCE mode; and

Use—*use the TCE model to achieve corporate objectives*: how to maximize customer value and reduce service costs, delivering consistent and branded TCE across channels, and improving sense and response time and effectiveness.

Who Should Attend

This program is designed exclusively for the *Marketing, Sales and Service Executives of Financial Services*, who aim to:

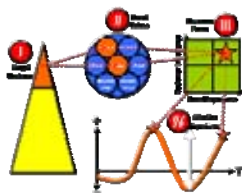
- *Build* a comprehensive architecture to measure, manage, and improve TCE across the entire customer lifecycle;
- *Measure* the impact of TCE in driving satisfaction, differentiation, acquisition, retention, ARPU, advocates, and NPS;
- *Lead* the change from product-centric to customer-centric, and get management buy-in, with numbers and results.

Program Components



To maximize the learning effectiveness and to enable participants to put concepts into practice, this program consists of three phases: pre-workshop e-Readings, e-Workshop and post-workshop e-Coaching. The program is designed to allow you to understand the principles of effective TCE management, how to build a TCE model, and how to use the TCE model to achieve your own business objectives.

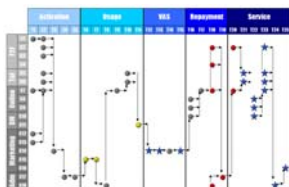
Jul~Aug: Pre-Workshop e-Readings



Program attendees are required to read a series of white papers and reports to equip themselves with a basic understanding of the principles:

- *Effective TCE (Total Customer Experience) Management;*
- *Critical Moments @ Experience: X-MOT, MOD, and MOB; and*
- *TCE (Total Customer Experience) Evaluation.*

Aug 27: e-Workshop



Program participants attend a 90-minute TCE Model Building e-Workshop to equip themselves with the basics of:

- *Mapping TCE Touch-Points and associated Channels;*
- *Defining Typical TCE Journeys by different Segments; and*
- *Building an integrated and pragmatic TCE Process Model.*

Sep~Nov: Post-Workshop e-Coaching



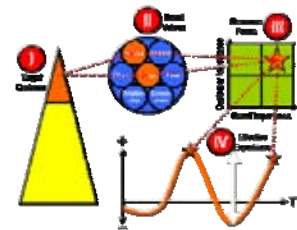
Program participants will attend a 60-minute one-on-one e-Coaching session, with Program Leader Sampson Lee, for individual consultation on:

- *Managing TCE by maximizing customer value and reducing service costs;*
- *Delivering consistent and branded TCE across Channels;*
- *Improving Sense and Response time and effectiveness.*



e-Readings

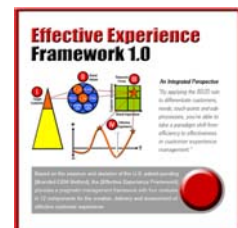
UNDERSTAND the Principles



Prior to attending the TCE Model Building e-Workshop, five TCE/CEM white papers and a global mobile network operator TCE research report will be sent to program participants for pre-workshop study and training preparation. This will allow program participants to grasp the foundation principles of effective TCE management: how to create a memorable, positive, and highly differentiated experience across multiple channels and touch-points with minimal resources. The e-Reading materials cover the following content:

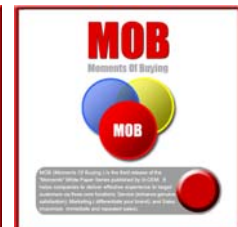
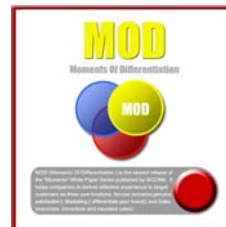
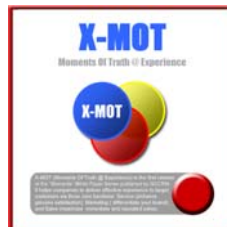
Effective Experience Principles

Nowadays, the challenge of customer experience management is that delivering a good experience is not good enough. You need to deliver an effective experience. Only when you're delivering effective experiences, can you survive, grow, and create customer loyalty. This paper renders a pragmatic framework for the creation, delivery, and assessment of effective customer experience. An effective experience has to be **REMEMBERED, BRANDED, and CONTRASTED**.



Critical Moments

It takes the combination and optimization of the following three moments in order to deliver an effective experience to your target customers for three of your core functions – Service (enhancing genuine satisfaction); Marketing (differentiating your brand); and Sales (maximizing immediate and repeat sales):



[X-MOT] – Moments of Truth @ Experience in creating positive memories and emotions;

[MOD] – Moments of Differentiation in reflecting your most differentiated brand values;

[MOB] – Moments of Buying in driving acquisition and retention.

TCE Evaluation

TCE Evaluation is the beginning of the whole TCE journey. It consists of TCE Model Building and TCE Assessment:

[TCE Model Building] sets a comprehensive blueprint and renders a complete architecture to measure, manage, and improve the total customer experience perceived at multiple touch-points and channels across the entire customer lifecycle

[TCE Assessment] quantifies the effectiveness of experiences in driving customer satisfaction, brand differentiation, acquisition, retention, and advocates; derives the critical moments; and benchmarks the total customer experience.

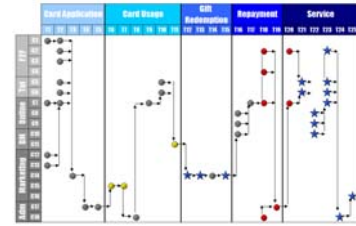


Note: Six white papers and reports will be sent to attendees in e-files upon confirmation of registration and full payment.



e-Workshop

BUILD a TCE Model



By attending the 90-minute TCE Model Building e-Workshop, program participants will learn how to build an integrated and quantifiable TCE model: how to map touch-points and associated channels across the entire customer lifecycle, define typical customer journeys by different segments, and build a pragmatic TCE model. The content of the e-Workshop includes:

I. Understanding Principles

- How Customers Feel, Remember, Compare, and Choose
- Critical Moments: X-MOT, MOD, and MOB
- TCE Evaluation: TCE Model Building and TCE Assessment

II. Building a TCE Model

- Why Build a TCE Model: The Beauty and The Pre-Requisites
- How to Select Appropriate Touch-Points and Channels for your TCE Model
- How to Map Touch-Points across the entire Customer Lifecycle
- How to Map Channels to correspond with each Touch-point Experience
- The Most Common Mistakes when Defining Touch-Points, Channels, Sub-Processes, and Attributes
- How to Define Typical Customer Journeys for Different Segments at Different Customer Lifecycles
- The Problem of Over-Generalization of Customer Journeys
- How to Build a Pragmatic TCE Model that you will use to Measure, Manage, and Improve
- Examples from Building Telecom TCE Models

III. Using the TCE Model

- How to Design a Target Experience by Objectives
- How to Innovate and Reengineer Touch-Points and Channels
- How to Optimize Resource Allocation among Touch-Points and Channels
- How to Analyze Gaps to Derive Required Capabilities
- How to Set KPIs and Measurement Metrics
- Example for Using a Telecom TCE Model

IV. Questions and Answers

Note:

1. Detailed instructions to install an online application will be sent to attendees prior to the e-Workshop.
2. The e-Workshop is a live online workshop. No recorded version will be available.
3. The e-Workshop lecturing materials will be emailed to participants prior to the e-Workshop.



e-Coaching

USE the TCE Model



After attending the TCE Model Building e-Workshop, an individual one-on-one 60-minute e-Coaching session will be arranged between each program participant and the Program Leader, Mr. Sampson Lee. At the one-on-one e-Coaching session, each program participant consults with Sampson with their own questions and issues when applying the TCE Model to achieve target objectives: how to manage TCE by increasing ARPU and decreasing churn, deliver consistent and branded TCE across channels, and improve sense and response time and effectiveness. Possible coaching topics follow:

TCE Assessment

- Evaluate Effectiveness in Driving Corporate Objectives
- Derive Critical Moments to the Brand /Bottom-lines / Loyalty
- Benchmarking Total Customer Experience against Competitors

	Importance to Bottom	Importance to Subscribers	Importance to Micro-segment	Importance to Acquisition	Importance to Retention	Importance to KPI	Importance to Net Promoter
10	9	25	23	9	27	27	27
10	9	29	23	23	28	27	27
10	28	28	28	23	27	27	27
10	18	18	18	23	27	27	27
10	12	24	24	24	27	27	27
10	22	27	27	28	27	27	27
10	22	28	27	27	27	27	27
10	7	18	27	9	7	18	17
10	8	28	28	28	27	27	27
10	18	18	18	18	22	28	28
10	22	18	9	28	28	22	22
10	14	9	9	7	9	9	9
10	18	18	18	9	22	18	9
10	28	22	22	22	28	18	22
10	18	12	12	12	18	9	12
10	2	18	28	27	23	28	28
10	1	12	18	28	1	1	18
10	9	9	22	18	4	22	18
10	28	9	18	4	18	9	7
10	9	2	18	2	9	2	2
10	18	1	7	1	4	2	1
10	28	1	6	1	9	17	4
10	9	1	1	4	18	12	9
10	27	4	12	1	1	7	9
10	24	9	9	28	17	24	27

Design Target Experience

- Design Target Experience by Objectives
- Derive Target Emotion Curves
- Decide Target Moments of Truth

Touch-Point Reengineering

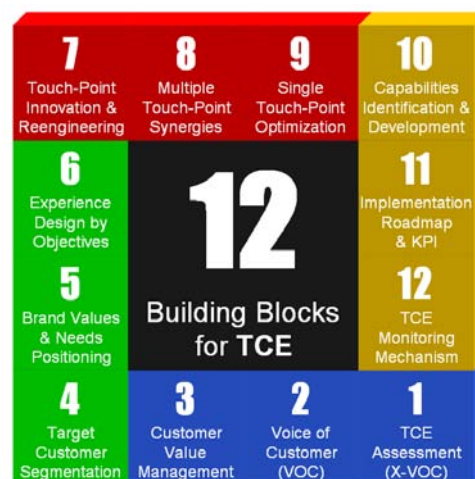
- Review Mix of Touch-Points and Channels
- Review Sequence of Touch-Points and Channels
- Derive Target Mix of Touch-Points and Channels

Resource Optimization

- Maximize PPG (Pleasure-Pain Gaps)
- Synergize Multiple Touch-Points and Channels
- Reallocate Existing Resources by Objectives

Gap Analysis & KPI

- Map the Gaps between Target and Current Performances
- Derive the Required Capabilities in Bridging the Gaps
- Set Key Performance Indicators and Measurement Metrics



Note:

1. The e-Coaching session must be arranged at least two weeks in advance. Date and time must be mutually convenient and agreed to by both Program Leader and participant.
2. The e-Coaching session may take place by telephone (participant originates call), or on Skype.
3. The e-Coaching session must be used by the participant within three months of the e-Workshop.

Program Leader



- Inventor of the three U.S. patent-pending business methods
 - Branded Customer Experience Management Method
 - Purchase Experience Assessment and Optimization Method
 - Branded City Experience Management Method
- Co-founder of the 3C Method
- Master Trainer of the Global CEM Certification Program
- Visiting Ass. Professor of The University of Hong Kong – Master of E-Commerce and Internet Computing (CRM Module)

Sampson Lee, the founder of G-C-EM, invents three patent-pending customer experience management methods. He applies modern psychology and human behavior disciplines into business practices to create effective customer experience for today's business organizations.

Lee and his International Partner team deliver Global CEM Certification Program in Asia, Europe, Middle East and the United States, spanning across 8 cities.

Lee delivers training and provides consulting to multinational corporations. He conducts unconventional experience-centric X-VOC Research at various customer touch-points and creates the Total Customer Experience (TCE) Evaluation to help enterprises to build an integrated management system to measure, monitor and improve customer experience across multiple touch-points throughout the entire customer lifecycle.

Lee is the Visiting Ass. Professor of the University of Hong Kong, teaching the CRM module of the Master of e-Commerce and Internet Computing since 2004.

A well-regarded authority in its field, Lee speaks for many regional and international forums and conferences. He also contributes regularly to major customer management portals and business publications including CustomerThink.com, MRI Research, and leading business journals like Harvard Business Review in China. Lee sits on the Advisory Council of CustomerThink.com - the world's largest customer management community serving 300,000+ members.

Prior to running his own company, Lee has accumulated wealth of experiences in marketing and sales, holding senior management positions in FMCG, telecom & IT industries.

Program Schedule



e-Readings: UNDERSTAND Principles

Jul ~ Aug

Note: Six white papers and reports will be sent to participants in e-files upon confirmation of registration and full payment.



e-Workshop: BUILD a Model

Nov 27 (09:00-10:30 GMT)

Notes:

1. Detailed instructions to install an online application will be sent to attendees prior to the e-Workshop.
2. The e-Workshop is a live online workshop. No recorded version will be available.
3. The e-Workshop lecturing materials will be emailed to participants prior to the e-Workshop.



e-Coaching: USE a Model

Sep ~ Nov

Notes:

1. The e-Coaching session must be arranged at least two weeks in advance. Date and time must be mutually convenient and agreed to by both Program Leader and participant.
2. The e-Coaching session may take place by telephone (participant originates call), or on Skype.
3. The e-Coaching session must be used by the participant within three months of the e-Workshop.

Program Fee

1. Program fee is USD1,000 per person
2. The fee includes reading materials (for e-Readings), training fee (for e-Workshop), and consultation fee (for e-Coaching).

About G-CEM



G-CEM (Global Customer Experience Management Organization) helps companies to create effective customer experience. Our patent-pending methodologies combine the art and science of CEM in assessing and delivering branded and total customer experience (TCE). G-CEM International Partners are located in Europe, Asia, and North America. Our services include [TCE Evaluation](#) and [CEM Certification](#). Visit Us: <http://www.G-CEM.org>.



Total Customer Experience (TCE) Evaluation

The TCE Evaluation consists of two parts: TCE Model Building sets a comprehensive blueprint and renders a complete architecture to measure, manage, and improve the total customer experience as perceived at multiple touch-points and among multiple channels across the entire customer lifecycle. The TCE Assessment measures the effectiveness of experience in driving customer satisfaction, brand differentiation, sales transactions and creating advocates. The combination of TCE model building and assessment helps companies deliver a branded and effective total customer experience. For details, please visit: <http://TCEevaluation.G-CEM.org>.



Global CEM Certification Program

The Global CEM (Customer Experience Management) Certification Program is designed and co-delivered by G-CEM International Partners and endorsed by nine authorities. Since January 2006, G-CEM has run the program in London, Amsterdam, Paris, Dubai, Shanghai, Hong Kong, Singapore, and San Francisco, with clients from 37 countries across five continents. For details, please visit: <http://CEMCertification.G-CEM.org>.

e-Workshop Registration

Contact us: training@g-cem.org

Shanghai
Tel: 8621-6132-9932
Fax: 8621-6132-9934

Hong Kong
Tel: 852-2213-7388
Fax: 852-3077-6111

Company Information >>>

Company	
Company Address	
Company Website	

Attendee Information >>>

First Name		Last Name	
Gender	<input type="checkbox"/> Mr. <input type="checkbox"/> Ms.	Location	
Position			
Email			
Phone		Fax	

First Name		Last Name	
Gender	<input type="checkbox"/> Mr. <input type="checkbox"/> Ms.	Location	
Position			
Email			
Phone		Fax	

First Name		Last Name	
Gender	<input type="checkbox"/> Mr. <input type="checkbox"/> Ms.	Location	
Position			
Email			
Phone		Fax	

First Name		Last Name	
Gender	<input type="checkbox"/> Mr. <input type="checkbox"/> Ms.	Location	
Position			
Email			
Phone		Fax	

Signature:

I understand that all reading and materials obtained are strictly for my own educational purposes. G-CEM owns the copyrights of all program materials and no reproduction is allowed without the written consent of G-CEM

Code: GCEMWS

Program Fees >>>

Standard Price	USD1,000 per person	_____ persons
Group Discount Minimum 3 or above	USD950 per person	_____ persons

Program fee is USD1,000 per person.

Group discount of USD950 per person is available for a group of 3 or more attendees to register together from the same company.

The fee includes reading materials (for e-Readings), training fee (for e-Workshop), and consultation fee (for e-Coaching).

Program Schedule >>>

August 27, 2009 0900 — 1030 GMT

Method of Payment >>>

Payment should be made within 5 working days after registration confirmation and your place is ONLY secured on receipt of payment.

Bank account details will be provided in separate notification for your bank transfer purpose.

Important Notes >>>

1. Acceptance is subject to the discretion of the Organizer. Applications, upon full payment, will be processed on a first-come-first-served basis.
2. Subject to confirmation of registration and completion of full payment, pre-workshop e-Readings, e-Workshop lecturing materials and detailed instructions to install an online application will be emailed to attendee prior relevant deadlines.
3. The e-Workshop is a live online workshop. No recorded version will be available.
4. The e-Coaching session must be arranged at least two weeks in advance. Date and time must be mutually convenient and agreed to by both Program Leader and participant.
5. The e-Coaching session may take place by telephone (participant originates call), or on Skype.
6. The e-Coaching session must be used by the participant within three months of the e-Workshop.
7. When a program is over-subscribed, additional classes may be opened. Applicants will be notified of the new time whenever applicable; when a program is under-subscribed, original class may be cancelled. Full refund will be arranged within 30 days of the cancellation.
8. All readings and training materials obtained are strictly for attendee educational purpose. G-CEM owns the copyrights of all program materials and no reproduction is allowed without the prior written consent of G-CEM.

Online Registration:

http://www.g-cem.org/eng/eworkshop_online_registration.jsp