

C-Suite Customer Journey

How to Involve Top Management in Market Research

For answering some questions, it is inevitable to conduct research with the top management or so-called C-Suite level, e.g. with CEOs and CFOs. Researching this group is characterized by many challenges. With help of a practical example from the research of Deutsche Post AG, it will be illustrated how these can be brought together.

Strategy Workshops with Top-Customers of Deutsche Post AG

As part of a project driven by central key account management of Deutsche Post AG, top customers had to be included in the long-term planning of Deutsche Post AG, to identify strategic areas of action and to jointly develop innovative solutions. The following key questions were asked:

- What challenges and opportunities do executives from the top corporate customers see for themselves, their companies and their industries in the upcoming year?
- What are the development tasks? What measures are already planned?
- What role should a logistics company take on to help as a partner with these tasks? How can Deutsche Post strategically develop in this role?

To answer these questions, only a survey of C-Suite participants was deemed to be appropriate. Some as-

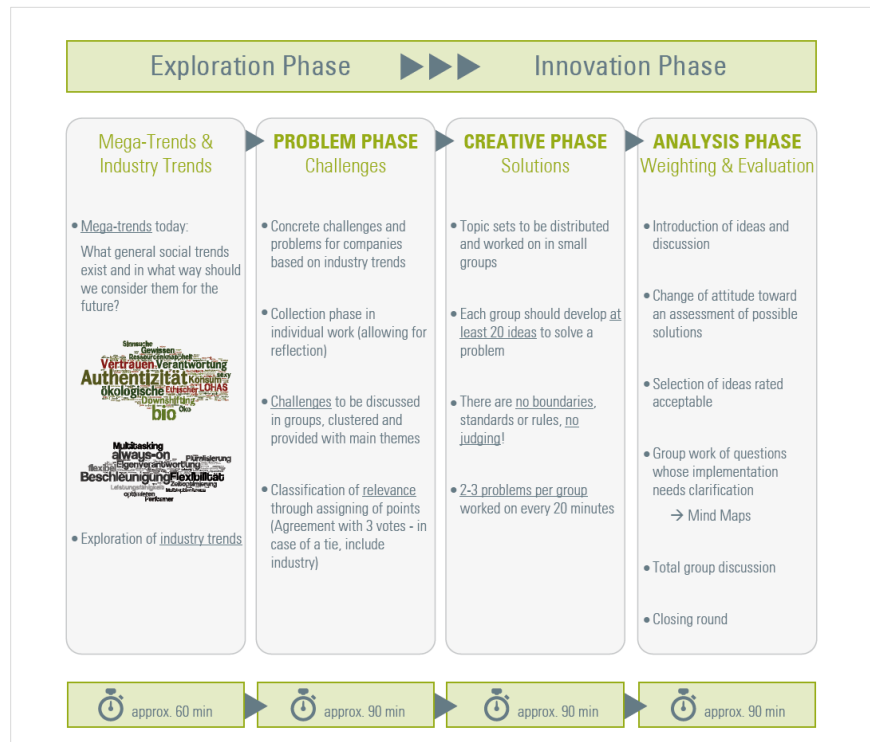


Figure: Proceeding of the Strategy Workshops

pects had to be considered when setting up the research design:

- Executives at the C-Suite level rarely allow for a satisfactory questioning of themselves in standardized quantitative studies. While top decision-makers indeed possess a comprehensive perspective, at the same time they are often unable to recall concrete details about the day-to-day business. Furthermore, these views are formed from their own experienced customer relationships, especially those outside of the common

company interfaces, thus rarely depicting a standardized touch point model. C-Suite level research should allow enough room for non-standardized aspects of cooperation.

- The customer value of an individual contact at the C-Suite level is, in general, very high. Thus, it is all the more important not to "burden" this customer base with inappropriate market research measures. Often, it is key account managers who look at the questioning of their customers with skepticism. Therefore, it is nec-

essary for all parties to keep the research as useful as possible, to integrate parallel, early and intensively, sales and customer relationship management as well as the customer side.

- The side effects of surveys have special meaning in the field of C-Suite research. Because in addition to the response to the research question, research among this target group should always have an impact on customer loyalty and express appreciation to the participating top customers.

Additionally selected employees from key account management should be integrated in an appropriate way into the research process, in order to use internal expertise for strategy development. Moreover, this integration of individual employees is targeted at commitment and a direct influence on the discussion in exactly those departments, which later should be responsible for the implementation of the strategy. The internal aim of the project consequently leads to the use of qualitative methods, since only they allow for the necessary flexibility in the research process to differentially react to client demands and to grasp the reality of their customer experience. Three full-day strategy workshops were then conceptualized, with 20 high-ranking decision-makers from the C-Suite Level from different industries.

The strategy workshops were conducted under the following conditions (see figure), which, from our perspective, prove to be success factors for research on strategic topics with C-Suite target groups.

Methodological Framework

Step 1: Morning Exploration Phase: The workshops began with an open

discussion of trends, challenges and capabilities with the clients. Here, the moderating team deliberately avoided all thematic requirements and limitations. Prioritization of key areas of action for Deutsche Post AG was done at the end of the exploration phase.

Step 2: Strategic Summarization during the Participants' lunch break: In order to prepare the solution-oriented innovation phase in the afternoon, the moderators together with the client, selected and summarized the findings into a few main core problems. Finally, those core problems were translated into handy and concrete creative tasks.

Step 3: Afternoon Innovation Phase: Integrating the client was planned for the afternoon innovation phase. During the lunch break, participants from the client and customer side met with one another and were divided into groups for the innovation phase. In each case, two customers and two employees of Deutsche Post AG met. The small groups each respectively received topic sets with tasks, developed by the moderator team in step 2. To begin with, within their groups, participants were asked to come up with as many spontaneous ideas as possible within a short time frame to face the upcoming challenges, without giving thought to their feasibility. Following the production phase, all ideas were presented, commented upon, categorized and prioritized.

Organizational Framework

In order to make this project happen and a success special attention had to be paid to the organizational aspects:

Exclusive Recruiting: The participating customers were personally invited by their sales employees to the work-

shop. Prior to the personal contact, an additional high-level announcement was made through the management of the Deutsche Post AG.

Collective Supporting Program: The whole-day workshops were accompanied by a supporting program that provided an evening activity for customers and Deutsche Post. The social activities were clearly separated from the market research portion and completely organized by the client side. Due to compliance reasons, no incentives were provided to the participants. Follow-Up Process: An important characteristic of the target group is that it often expressed great interest in the results. This should definitely be considered in the planning of measures on the client side, since the short-term positive effects of the workshops on the customer relationship can be deepened through follow-up.

Results

We cannot go into detail in regard to the substantive results of the strategic approach to the question. This much, however, can be said: the workshops far exceeded expectations in regard to the number, depth and diversity of ideas and approaches developed. Next to the content input, the workshop can have, above all else, an amazing communicative impact. The interaction with participating customers during strategy development values and strengthens the relationship and also strongly impressed the management of Deutsche Post DHL. The activity was perceived among this group as an exceptional event. On the employee side, they achieved a high identification with the outcomes. Unlike in consumer research, the integration of employees with C-Suite customers meant

more than just a confrontation with reality. During the co-creation process, employees, who had previously been briefed, were given the opportunity to broaden their perspective and to learn from customers. The result was a positively appreciated communication on equal footing, with true concerns for the other side's perspective.

Appraisal and Success Factors

A critical appraisal inevitably locates the described research design in a border area between market research and CRM. Because customers and

employees encounter one another in an open research process, boundaries are blurred and open themselves up to new levels of discourse between service providers and customers.

In this constellation, the market researcher must, more than ever, position himself as neutral and stress this role in advance vis-à-vis sales-oriented interests.

From our experience during the workshop, clear success factors are the clarification of roles and an explicit division of responsibilities in customer service. At the same time, particular attention must be given to the internal project collaboration: Due to

the maximum openness of the design, it is necessary to perform an analytical division of the key themes in a short time between the exploration and innovation phase, which is only possible through brief and efficient confirmation between client, inhouse market research and the implementing institution. The results of this project were very valuable for Deutsche Post DHL and labeled as impressive, brave and farsighted and the approach was seen as commendable and a benchmark for other companies. ◀

► Abstract

Customer relationships with top management in a b2b context are characterized by their particular complexity and sensibility to customer value. Yet in quantitative research with top customers questions often remain unanswered: What is actually excellent service quality? What development tasks do customers see regarding daily business? Questions, which should be responded from the highest position on the customer side, in order to develop the future direction of the company. With the envisioned study concept for top management research, it is possible to involve the discerning target group and to lead a partner-based discussion on real innovation.

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