

# Oilfield Customer Experience Monitoring



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**Gelb**  
An Endeavor Management Company

# Monitoring Customer Satisfaction in the Oilfield

## Overview

Customer satisfaction and relationship management are key to a company's overall success. While factors such as quality, expertise, technology and innovation continue to play critical roles, customer satisfaction and relationship management are determining factors in retaining client business. In an effort to focus more on the customer, oilfield services companies are launching static customer surveys for which results are delayed and rarely reach the intended respondents. However, customer satisfaction surveys fall short of providing actionable information. As organizations wait for data collection and analysis, valuable time is wasted and "at-risk" customer relationships remain undetected.

The oilfield presents more complications than most industries. Respondents are harder to find, they have busy schedules, and most reports on the market provide very small sample sizes. Oilfield executives likely challenge results, but pay attention to industry ratings and "seals of approval." There is no doubt that customer satisfaction measurement is important. But equally critical is who you talk to, how and when you conduct the survey and what you do with the results.

Gelb's Customer Experience Dashboard provides a cost-effective solution to this dilemma. This customer listening post is an active, live tool through which inquiries are made to elicit feedback at times most relevant to the customer experience, not an arbitrary launch date. Most importantly, results are provided in real-time and escalated for immediate action. Why wait for a survey report?

Here we will explore the benefits of dashboards and share criteria to use when determining whether a survey or a dashboard is best to monitor your customers' level of satisfaction.

## What's in a Customer Satisfaction Survey?

Traditional customer satisfaction surveys have become highly standardized to produce benchmarks. In this mutation, key factors have been muted and become, in many cases, generic. In addition, little analysis is done with those surveys to ascertain what matters most to customers and their willingness to use your services in the future.

Consequently, customer satisfaction measurement tools are now used to highlight how much "better" an organization is than another on a similar set of measures. While this might provide short-term benefit in advertising (e.g., most preferred as rated by Company X), it does not address the fundamental issue of retaining customers who are loyal to your company.

In addition, those responsible for delivering the customer experience often question the validity of such surveys. The sample composition is most often to blame. In many industries, it is very difficult to build a pool of respondents. The net result is a report that is scrutinized and sits on a shelf.

Ultimately, with surveys, several important needs are unmet including:

- Delivery of timely information
- Respondents consisting of customers
- Respondents made up of the "right," relevant people

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## The Benefits of Gelb's Customer Experience Dashboards

### *Respondents Consisting of Your Customers*

Through Gulf Research, a partnership between Gelb and Gulf Publishing Company, we can access over 30,000 qualified upstream oilfield decision makers. Our Gulf Research Panel, which utilizes an opt-in database of over 100,000 readers of World Oil and Hydrocarbon Processing. Gulf Research is the premier provider of market intelligence for the upstream and downstream oil and gas industry. Gulf Research provides leading oilfield service companies such as Baker Hughes, Halliburton, Schlumberger and Weatherford with market knowledge and insights about marketing strategy, brand equity evaluation and technical needs within the industry.

This is a high-quality research source because respondents have been pre-qualified by Gulf Publishing. In order to qualify for the research panel, respondents must subscribe to a Gulf Publishing trade journal. In order to obtain their subscription, readers must have a relevant position within the oil and gas industry. World Oil uses the BPA Worldwide audit service to ensure the accuracy and quality of circulation members. BPA Worldwide is an independent, not-for-profit organization that audits the circulation of publications; BPA auditors examine the circulation files to make sure they are correct and current. This third-party information verifies that we are truly reaching the target market.

Additionally, demographic information is collected upon panel member registration, and is confirmed in several online surveys over the year to ensure appropriate criteria are met. Gulf Research panel members hold a variety of positions worldwide, and have wide ranges of experience. These respondents are motivated to respond because of their industry experience and commitment, and provide high-quality responses to open-ended questions. Gulf Research surveys are user-friendly and adaptable for respondents who hold various positions and work with many products and services. The use of respondents who are directly involved in the industry enables us to overcome many security challenges associated with online surveys, and obtain high-quality data about trends in the oilfield.

Gelb also allows its clients to utilize their existing email databases, cross-referenced against our panel, to increase response rates and improve face validity.

### *Real-time Responses Build Customer Relationships*



*Customers provide feedback as part of their experience*

Gelb provides real-time customer experience dashboards. You can ask questions at the conclusion of a proposal process (whether or not you've won), post-project, or even while a complex project is underway. Our experience dashboard is an additional listening post to help you better manage customer relationships.

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## Cost-Effectiveness and Accessibility

Gelb's Customer Experience Dashboard provides a cost-effective solution. For less than \$20,000 per year, we provide a live tool which allows for unlimited responses. In addition, each questionnaire is customized to your needs (we know that drilling fluids and drill bits require different key buying factors).



Reports are accessed via Gelb's secure portal.

In contrast to other "online portals" there are no per seat license fees (truth be told, there's no additional cost for additional users to the supplier). We want everyone in the organization to see the responses your customers provide for continuous operational improvement, internal benchmarking, and service recovery.

*Our approach asks for participation in context of the experience, rather than waiting for an arbitrary date. We accommodate any interview mode (email, phone, online, regular mail, or on-site).*

There are no charges per user, making global information distribution not only cost effective, but easily accessible.

Our price point for a global experience dashboard (at a friends and family discount and for a multiple-year contract) is about the same as most competitors' one-time report fee. We offer unlimited responses and an easy to use upload tool for your account managers to elicit feedback from customers when it matters most.

## Escalation Feature for "At-Risk" Customers

*Results are tabulated in real time.*



*As soon as results are entered, they are tabulated. "At risk" responses are escalated immediately via*

Results are provided in real-time and escalated for immediate action. Gelb can provide you customer experience dashboards which have been utilized successfully to pulse oilfield customers and deliver results in real-time.

The primary advantage is that our system helps facilitate service recovery. Our system escalates dissatisfied customers to the appropriate managers to aid in customer retention efforts (rather than wait for a static survey report to come out).

Customers' verbatim responses are also recorded and included in emails making statistics more meaningful. Our customer experience dashboards also allow senior management to track the recovery activities of account managers/regions.

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## *Actionable Results*

Furthermore, our dashboards remain "on" throughout the entire project cycle. This results in high quality feedback because it's placed in the context of the customer experience. It relates to a specific project rather than the overall relationship and general impressions. This allows you to elicit customer feedback when it matters most, not an arbitrary launch date.

Through our unique "escalation" feature, responses from customers deemed "at-risk" are placed into a queue. Each response is emailed to a specific designee within your organization for service recovery. The queue can be updated to reflect additional comments and the most recent status. Executives can view the queue to monitor problem resolution or examine trends.

*Attached is a checklist of criteria to use when determining whether a survey or a dashboard is best to monitor your customers' satisfaction.*



*Administrators can access results anywhere and, depending on access, view all results.*

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## Customer Satisfaction Measurement Tools – Checklist

- **Actual Sample Size** - Read the fine print. The number of evaluations is not a reflection of the number of unique respondents. Request the number of unique respondents, which differs from evaluations. Respondents can evaluate more than one company and that number is what many firms misleadingly promote, not the actual sample size.
- **Relevant Respondents** - Verify that the pool of respondents consist of your company's target audience in other words the "right" people. While companies will not share a list of contacts with you – they should share with you the positions/roles (e.g., field engineer) that will be targeted along with the type of company (e.g., drilling contractor firm).
- **Representative Customers** - There are no controls to truly ensure that respondents are your actual customers other than using your own lists. Using a panel, you might run into a situation that those with purchase responsibilities evaluate companies with which they haven't had experience. Review the list of targeted companies to ensure they include your representative customers.
- **Global Voice** – In today's global economy, it is important that your audience is not alienated by communications. The survey should speak to customers from all reaches of the globe and not be U.S.-focused. It should also be available in multiple languages to speak to your company's global customer base.
- **Time Sensitivity** – Establish a timely launch schedule. With a survey, this means that you need to launch it at a time that is pertinent to your customers' needs. With a dashboard, the customer satisfaction questionnaire is launched in real-time at the time of service ensuring that customer concerns, at-risk customers will be escalated to your attention.
- **Real-time Results** – Many firms sell online results, but online does not mean real time. Internet accessibility of survey results may be a good way to disguise accessing otherwise static information. Ask whether the information is being fed through real-time. If not, are you paying to access a report accessed through a browser?
- **Cost-effectiveness** - Compare prices. Some firms charge as much as \$20,000 per evaluation per survey and add seat license fees. This just creates more work for you. Look for surveys that provide real-time, multiple responses at the same price for a one time survey report.

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## About Endeavor

Endeavor Management, is an international management consulting firm that collaboratively works with their clients to achieve greater value from their transformational business initiatives. Endeavor serves as a catalyst by providing pragmatic methodologies and industry expertise in Transformational Strategies, Operational Excellence, Organizational Effectiveness, and Transformational Leadership.

Our clients include those responsible for:

- Business Strategy
- Marketing and Brand Strategy
- Operations
- Technology Deployment
- Strategic Human Capital
- Corporate Finance

The firm's 40 year heritage has produced a substantial portfolio of proven methodologies, deep operational insight and broad industry experience. This experience enables our team to quickly understand the dynamics of client companies and markets. Endeavor's clients span the globe and are typically leaders in their industry.

Gelb Consulting Group, a wholly owned subsidiary, monitors organizational performance and designs winning marketing strategies. Gelb helps organizations focus their marketing initiatives by fully understanding customer needs through proven strategic frameworks to guide marketing strategies, build trusted brands, deliver exceptional experiences and launch new products.

Our websites:

[www.endeavormgmt.com](http://www.endeavormgmt.com)

[www.gelbconsulting.com](http://www.gelbconsulting.com)

[www.gulfresearch.com](http://www.gulfresearch.com)