

Building a customer-centered digital consultancy

Planning and implementing meaningful CX measurements to reduce risks while creating greater business value in professional services



In partnership with



SITECORE



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Introduction

Why CX is Important for Digital Consultancies and Their Customers

Customer experience (CX) is widely acknowledged as a primary point of competitive advantage and differentiation. When done well, it creates category leaders, and when CX is lacking, it creates opportunities for competitors.

The investments that brands make in their digital experience and marketing technology infrastructure can make significant contributions to their overall customer experience. But making the most of those investments often requires working with a digital consultancy to assist with the strategy and implementation of tools and platforms that end customers will benefit from.

Hiring the right digital consultancy to assist with these critical projects has a major impact on the potential outcomes, yet the customer experience that the brand has with their digital consultancy is rarely a prime consideration. For such a critical relationship, however, it can make the difference between a project that is successful and one that misses timing, budget, and ROI expectations, while causing the end customer experience to suffer.

This white paper will look at how one Sitecore partner invested in improving, evaluating, and optimizing the customer experience to drive greater short- and long-term customer value, while simultaneously building greater value for its business.

3 PRIMARY CHALLENGES IN CHOOSING A DIGITAL CONSULTANCY

The stakes are high

Projects, such as a Sitecore implementation of a new website, take months and considerable investment of time and resources to accomplish and to show a return on investment to the business. Thus, it's important to find the right partner and achieve a successful outcome on-time and on-budget.

The competition is fierce

With a large amount of agencies competing for customers, it can be hard to differentiate one from the other based solely on their external marketing communications (e.g. what they say about themselves), and what curated case studies or select references share.

Decisions are challenging

It is hard to do an "apples to apples" comparison between agencies due to the reasons above, and the wide variability between different companies' needs and requirements for each project. Comparing one agency to another relies on anecdotal evidence, and metrics that are often hard to quantify.



In this white paper we're going to explore how one digital consultancy—RDA—made investments in their customer experience in order to achieve best-in-class rankings in their industry and achieving high Net Promoter Score (NPS) rankings in the professional services sector at large.

Some of the results of their investments in CX include the following:

- **2022 Sitecore Global Partner Award for Customer Value /Impact**
- **Rated #1** in Customer Satisfaction among all Sitecore Platinum partners worldwide* (90)
- **Highest Net Promoter Score (NPS)** score among all Platinum partners worldwide* (63)
- **Rated #1** in Client Service among ALL Sitecore partners worldwide* (94.3/100)
- **Rated #1** in Quality of Work Product among all Sitecore Platinum partners worldwide* (93.6/100)

Let's explore how these significant wins were achieved, why these wins are important to RDA, and why they are important to the firm's customers.

Surveys performed by Digital Clarity Group / VOCalis.

**Among partners with >2 customer respondents.*



2022 VOCALIS AWARD

Highest Customer
Satisfaction per
Voice of the
Customer

PRESENTED TO

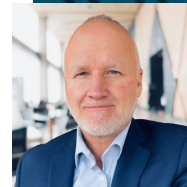
RDA

BY DIGITAL CLARITY GROUP



“Our industry-leading CX rankings are a reflection of our commitment to become the best possible partner to our customers.

The customer experience should absolutely be the battlefield.”



Chad Solomonson
Chief Customer Officer
RDA

Section 1

Building a CX Measurement Program

Establishing a Customer-Centric Culture

The Decision to Prioritize Customer Experience

Just as many brands struggle to maximize results from their investments in digital platforms, the digital consultancies that perform the work often struggle to build sustainable customer relationships that translate into valuable working partnerships. This creates a business climate where optimal outcomes are rarely achieved and long-term relationships are few and far between.

RDA was determined to set an example in both the digital consultancy industry and the professional services sector at large, by proving that it is possible to consistently deliver great customer experiences to the benefit of all parties.

As part of a set of strategic priorities, RDA, headquartered in Hunt Valley, Maryland, made the decision to invest in building a customer-centric culture that would ultimately lead it to industry-leading customer satisfaction results.

In addition to its strategic focus, it was imperative that a framework be put in place so that quantitative measurement could be achieved. Because of this, and the added benefit of an industry-benchmarked measurement platform that RDA could use to determine how it was ranking against its competitors, it was decided to utilize Digital Clarity Group's VOCalis measurement approach.



“Just as the work we perform is *technically* complex, providing a great holistic customer experience requires approaching it in several dimensions. By doing this we are able to ensure we are taking our customers’ full set of needs and expectations into account.”



Sue Rivero
Director of Customer Success
RDA

Establishing Customer Experience Measurement Criteria

The RDA team used the same criteria from Digital Clarity Group's VOCalis evaluation to build a CX measurement program for the consultancy.

The Key Performance Indicators (KPIs) consist of the following:

Criteria	Description
Initiation & Planning	Understanding business needs, Translating needs into a reasonable scope of work, Recommending creative approaches, Developing measures of success, Defining clear roles and responsibilities across all parties, Identifying potential risk mitigations, Negotiating a fair price to complete the engagement, Negotiating fair contract terms and conditions, Facilitating the licensing and other matters associated with any technology being used
Work Product	Quality of work performed, Creativity in work performed, Quality assurance (QA) process, Detailed product knowledge, Integration with other applications / systems , Data / content migration
Project Management	Team leadership, skills and capabilities, Sufficient and appropriate staffing levels, Managing expectations, Reporting progress and issues, Managing scope change, Meeting commitments and milestones, Engagement closure and hand-off
Client Service	Flexibility, Responsiveness to requests, Conflict resolution, Influencing critical stakeholders, Ease of working relationship, End-user education / training
Delivery Timing	Satisfaction with the duration of the project
Cost & Budget	Total project cost versus initial budget
Business Outcomes	Traffic, Engagement, Sales/revenue, Customer satisfaction, Perceived value
Technology Decisions	Technology choices made

Making Meaningful Changes to Constantly Improve CX

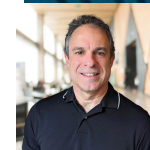
The consultancy evaluated its current processes and methods of delivery within each of the eight Key Performance Indicators and initiated targeted improvements. These improvements were made based directly on client feedback gathered via VOCalis.

The work performed to improve is reflected below:

KPI	Investments and Changes RDA made to address based directly on client feedback
Initiation & Planning	Made improvements to the Advisory Practice; Developed highly custom digital roadmaps and technology selections engagements
Work Product Project Management Delivery Timing	Added a PMO Leader and placed all PMs and Architects into one team to ensure best practices and predictable delivery
Client Service	Added a Customer Success Leader, Established quarterly executive meetings to educate on trends, map data and discuss the most important and strategic requirements,
Cost & Budget	Added both the PMO Leaders and Customer Success Leader to ensure alignment
Business Outcomes Technology Decisions	Improvements to the Advisory Practice as well enhancements to the Product Strategy & Technology Evaluation as part of customer engagements.



“By implementing CX insights from our VoCalis surveys, our PMO is focused on building deeper trust with our customers and strengthening our reputation as a business that truly cares about its clients.”



Rob Diaz
Director, Project Management Office
RDA

Section 2

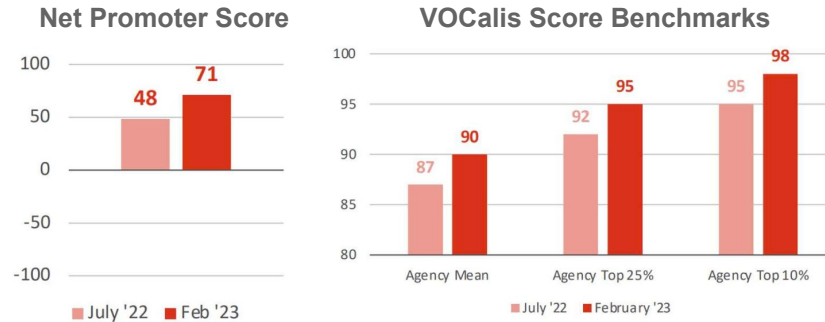
Return on Customer-Centricity

Achieving a win-win for the customer and the consultancy

The Results of RDA's CX Measurements

The meaningful changes that the consultancy made to its operations, staffing, and leadership, as well as to the way that it worked with its customers, yielded significant results, as shown below.

The following measurements show the impact of RDA's CX measurement initiative between July 2022 and February 2023:



Net Promoter Score (NPS) improved significantly, from 48 to 71. NPS is a popular market research metric based on a single question where customers rate the likelihood of recommending the agency to a colleague.

The average VOCalis Score for RDA improved from 87 to 90 in the past two cycles. Note also that the Top 10% benchmark for RDA in July '22 was the same as the Top 25% benchmark for the agency in Feb '23 (95).

Results courtesy of VOCalis by Digital Clarity Group as of May 2023

THE IMPLICATIONS FOR THE PROFESSIONAL SERVICES INDUSTRY

While RDA engages in specialized types of work in technology, marketing, and digital experience, the potential impact of a Customer Experience measurement program on any professional services firm is evident by applying the lessons learned from this initiative.

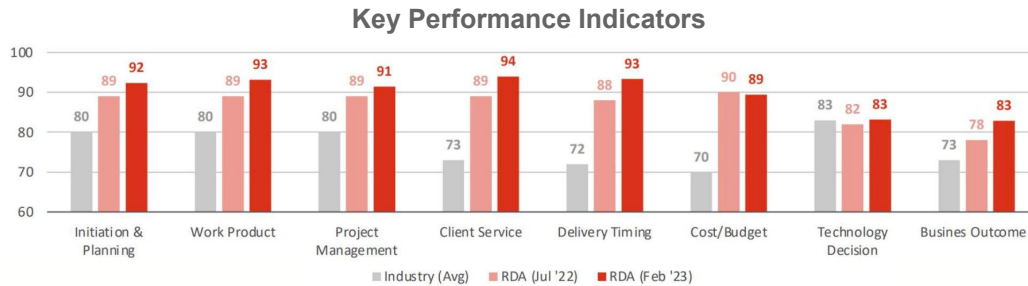
According to CustomerGauge's NPS Technology Guide 2023, the average NPS score for professional services companies is 44¹. This, compared to the score of 71 that RDA was able to achieve with a focused effort on areas of improvement.

While some of the specifics of the VOCalis framework may not apply to specific professional services firms, the lessons learned and the overall approach could conceivably be applied to any type of organization.

¹ CustomerGauge, NPS Technology Guide 2023, <https://customergauge.com/benchmarks/blog/technology-industry-nps-benchmarks>

Looking Deeper at Individual Measurements

A benefit of the VOCalis measurement framework is its ability to allow granular measurement and insights into specific areas of the customer relationship, call Key Performance Indicators, or KPI's. The chart below shows RDA's performance across the in the 8 KPIs over the last two cycles as well as a comparison to the industry average for each.



When reviewed more closely, there were significant improvements in almost every area across the board. Perhaps most significantly, Business Outcomes improved 5 points, from 78 to 83 between July 2022 and February 2023. Also, when looking at how RDA performed compared to the industry average, the three areas where the consultancy has the largest advantages are in Client Service and Delivery Timing (both with a 21-point gap), as well as in Cost/Budget (with a 19-point gap).

“While the majority of digital agencies receive positive feedback in *pockets*—performing well on some engagements while struggling on others—this is not the case for RDA. RDA’s customers *unanimously* agree that its services are top-notch, and we are proud to recommend RDA based on its excellent customer feedback.”



Scott Liewehr
CEO
Digital Clarity Group /
VOCalis Award

What the Results Mean

Of course, investments in the Customer Experience measurement are only truly valuable if they yield quantifiable results for both the consultancy and their customers. The nature of RDA's measurement program and the VOCalis methodology is designed to do just that: turn what was previously anecdotal and difficult to compare, into a framework that can show progress over time, as well as individual areas of opportunity and growth.

In addition to the marked improvements that an intentional Customer Experience Improvement program yielded, there are several other tangible benefits to customers as well as the agency:

- Connecting technical competency with business outcomes gives greater results
- Focusing on business outcomes from the beginning and following through to the end of the project yields both short and long-term benefits
- When data and measurements (or greater technical complexity) are connected to the project, NPS is higher

Simply put, the more extensively RDA's customers utilized their offerings from the very beginning through to measuring business outcomes, the greater their satisfaction.

EARLIER INVOLVEMENT, DEEPER DATA, AND TECHNICAL INVOLVEMENT YIELDS GREATER RETURNS

Further analysis of the data shows the effect that greater involvement in a project by a customer-centric digital consultancy like RDA yields higher customer satisfaction:

When RDA clients have the following services...		Their average scores are...	
		VOCalis Score	NPS
Application Design	With	91.6	100
	Without	84.5	40
Application Optimization	With	92.6	100
	Without	84.9	50
Cloud Migration	With	91.9	100
	Without	87	63
Data Analytics	With	93.9	100
	Without	86.7	65
Personalization	With	91.5	100
	Without	87.4	65

Results courtesy of VOCalis by Digital Clarity Group as of May 2023

Section 3

Achieving Sustainable Results

Ensuring a continued focus on the customer

What Comes Next?

Building on its initial successes and results, RDA plans to continue its efforts to build a customer-centric culture and maintain its industry-leading standing in customer satisfaction. With a consistent measurement framework in place through VOCalis, and a CX measurement program established, the consultancy plans to continue to improve in a measurable, focused manner. Three particular areas include the following:

Customer feedback guides focus areas of improvement

The ability to prioritize and focus on what is needed to move a business forward can be challenging. By gathering granular, quantitative feedback from its customers, RDA plans to use this information to inform where it focuses improvements on the customer experience. This ensures focused, meaningful impacts and improves efficiencies.

360 degree surveys and reporting

In addition to the VOCalis surveys which happen annually, RDA will begin doing 360-degree surveys throughout its projects in order to accomplish the following:

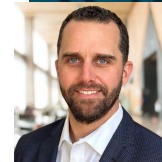
- **Risk Analysis** – Client Assessment + Engagement Complexity
- **Alignment with Client** – Engagement evaluation based on the perceived client perspective
- **Self-Assessment** – Self-evaluation of engagement performance

Continued technological leadership

As evidenced by the survey results, RDA's technical leadership in its customer relationships yields better results, including greater satisfaction. Thus, the consultancy will continue its investments in research and development of more robust and high-yielding technology solutions and approaches.



“We are proud of the results of our customer experience investments so far, and our initial successes have only motivated us to make further ones. Customer success is our north star, and that focus and purpose will continue to drive our investments in how we can deliver exceptional results for our clients.”



Matt Forsyth
President & CEO
RDA

Conclusion

A consistent, balanced approach to creating customer satisfaction and business value yields quantifiable results for all parties

Most business are aware of the competitive demands to provide an improved customer experience. Those organizations that achieve quantifiable, sustainable results, however, are most likely to follow a similar path to RDA. Some of the key steps include:

- Making a strategic decision to improve CX, supported by leadership at the highest levels
- Following a systematic approach to measurement that incorporates industry benchmarks
- Prioritization and implementation of feedback from the learnings of those measurements

Continued investments in acquiring customer feedback and making meaningful improvements stand to yield yet more winning results for RDA and any professional services organization willing to undertake a customer-centric transformation.

DRIVING BUSINESS VALUE THROUGH GREATER CUSTOMER SATISFACTION

RDA has built a multi-dimensional value model to continue to improve its customer satisfaction while delivering greater value to the business.

Areas of the Business	Business Value Outcomes
Business Outcomes	Elevate the client experience, Grow revenue & margin, Improve quality & manage risk, improve delivery efficiency
Strategies	Enhance security & improve compliance, Improve engagement & collaboration, Develop automation for document extraction, Implement cloud delivery platform, Align with tech partner, Streamline data
Financial Impact	Increased revenue, reduced risk, decreased costs
Operating KPIs	Service and product revenue, outcome as a revenue service, Efficiency through automation, contribution margin, utilization, COGS, Reduced overhead and backlog

Benchmarking



VOCalis is a Voice of Customer (VOC) assessment service to evaluate the performance of both digital partners (digital agencies and systems integrators) and technologies according to their customers. The service gathers input from customers who are implementing digital experience solutions, and from the digital partners who are working with them on those implementations. The VOCalis team analyzes and aggregates the inputs, providing value-added insight to buyers, digital partners, and technology vendors in a variety of ways, including benchmarking data, research reports, and custom analysis.

The VOCalis Award is earned by those agencies and integrators that consistently meet and exceed the expectations of their customers and that benchmark at the highest echelons of the industry according to the voice of the customer. The award is the only outcomes-based award in the industry, and it is a very strong indicator to enterprise buyers that a digital partner will deliver on its promises.

Learn more about VOCalis and Digital Clarity Group at:

<http://www.digitalclaritygroup.com/vocalis/>



**2022
VOCALIS
AWARD**
By DIGITAL CLARITY GROUP

Highest Customer
Satisfaction per
Voice of the
Customer

PARTICIPANTS AND CRITERIA FOR THE AWARD

VOCalis is the only benchmarked Voice of Customer program in the industry, capturing feedback from over 9,000 brands about their experiences with approximately 400 digital agencies. Among other rigorous criteria, the VOCalis Award is presented only to those agencies that receive customer satisfaction scores that place them in the 90th percentile of all agencies worldwide.

VOCalis Award recipients are few in number, and all of them have DCG's unwavering confidence in their ability to deliver services to the highest standards and expectations of their customers.

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About us



About The Agile Brand

The Agile Brand provides insights and education for marketing technology and CX leaders on strategy, trends, processes and platforms. It offers written, audio, and visual information, training, and workshops, including the award-winning podcast, *The Agile Brand with Greg Kihlström* and its international best-selling book *The Agile Brand Guide* book series. More information is available at: www.agilebrandguide.com



About Sitecore

Sitecore is the leading provider of an end-to-end composable digital experience platform, empowering brands to make unforgettable connections with their customers. Over 5,200 brands around the globe are using Sitecore to power their experiences. More information is available at: www.sitecore.com



About RDA

RDA is the leader in customer satisfaction among agencies delivering digital experience services. They are a digital consultancy on a mission to make a difference. Our team of strategists, designers, and engineers guide forward-thinking companies in delivering solutions that grow businesses and deliver results.

More information is available at: www.rdacorp.com