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CustomerExpress

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INDIAN CONSUMER SENTIMENT POST LOCKDOWN

rai RETAILERS ASSOCIATION OF INDIA

This consumer sentiment survey is being released by Retailers Association of India (RAI) along with LitmusWorld (under the LitmusWorld PeoplePulse initiative) to help retailers across India understand the retail shopping preferences and behaviour of Indian consumers post the lockdown.

LITMUSWORLD PEOPLEPULSE

33% of consumers are excited to shop post lockdown.

33% of consumers are excited to shop post lockdown.

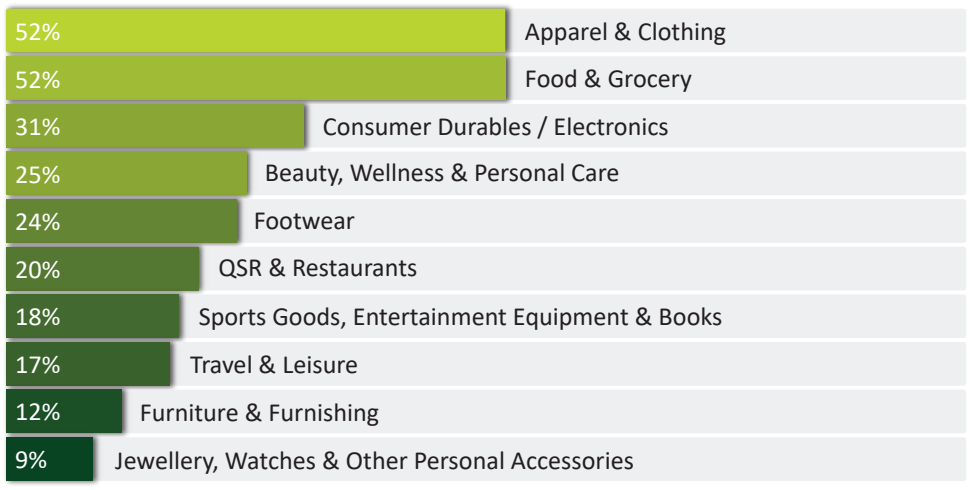
30% of consumers have a neutral shopping sentiment.

37% of consumers are not excited to shop post lockdown.

Respondents by City

Tier 1 (Mumbai, Bengaluru, Chennai, Delhi, etc.)	80%
Tier 2 (Agra, Amritsar, Chandigarh, etc.)	12%
Tier 3 (Aurangabad, Jodhpur, Gwalior, etc.)	8%

Categories Where Consumers Showed Immediate Interest



Change in Shopping Expenditure Post Lockdown

6% said their shopping expenditure would **increase.**

16% said their shopping expenditure would be **stay the the same.**

37% said their shopping expenditure would **decrease slightly.**

41% said their shopping expenditure would **decrease substantially.**

Preferred Mode of Shopping Post Lockdown:

67% respondents above the age of 45 prefer offline over online shopping.

64% men prefer buying offline whereas 60% women prefer buying online.

75% Tier 2 & 3 cities prefer buying offline, Tier 1 shows equal preference to online & offline.

Preferred Measures for Safe & Hygienic Shopping Experiences

75% prefer **regular sanitisation of stores**.

67% prefer **daily temperature checks** for all staff members.

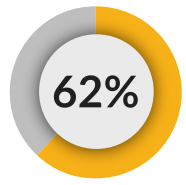
57% prefer **minimal staff interaction.**

48% prefer **sealed products**.

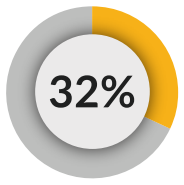
43% prefer **home delivery / pickup of returns**.

30% prefer **virtual trial rooms**.

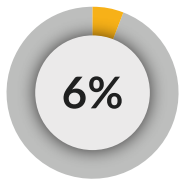
Strong Inclination of Respondents to Visit Retail Stores



of respondents are planning to visit the stores within the first **3 months**.



of respondents are planning to visit the retail stores in the next **3-12 months.**



of respondents will stay away from the stores for the **next 12 months.**

75% respondents in **Tier 2 and Tier 3 cities** are planning to visit Retail Store within the next 3 months

		Will increased spending	Will purchase within 3 months	Will prefer to shop online
Apparel & Clothing	**70%** respondents across age brackets and locations prefer visiting retail stores.	8.19%	75%	79.50%
Food & Groceries	**75%** respondents from Tier 2 and Tier 3 cities prefer shopping in retail stores	6.04%	61%	66.30%
Consumer Durables / Electronics	**70%** women prefer to buy online and 60% men prefer visiting retail stores.	6.00%	64.5%	72.54%
Beauty, Wellness & Personal Care	**60%** women prefer to buy online.	6.86%	63.72%	69.59%
Footwear	**70%** respondents across age brackets & locations prefer buying in retail stores.	9.01%	73.8%	80.68%
QSR & Restaurants	**20%** respondents showed interest in spending on QSR & Restaurants.	6.96%	71.85%	75%
Sports, Entertainment & Books	**67%** women prefer buying online & 62% men prefer visiting retail stores.	6.86%	67.48%	74.32%
Travel & Leisure / Lifestyle	**17%** respondents intend to spend on Travel & Leisure activities.	9.18%	70.4%	73.47%
Furniture & Furnishing	**64%** women prefer buying online & 61% men prefer visiting retail stores.	9.25%	67.44%	74.71%
Jewellery, Watches & Others	**70%** respondents prefer purchasing from retail stores.	14.10%	73.4%	77.35%

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POST-COVID BOUNCE BACK ADVICE FROM THE TOP CX INFLUENCERS OF 2020

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TOP CX Influencers 2020

"Be flexible and prepared for rapidly shifting conditions."

Adam Toporek
Customer experience expert, keynote speaker, customer service trainer

"COVID is accelerating change in your markets. This is a great opportunity for you to reimagine your customer experience to gain a competitive advantage by understanding Customer behavior."

Colin Shaw
Customer experience thought leader, bestselling author

"The silver lining is that people across the world are watching companies big and small, and seeing how they react and respond. And for those who can vote with their wallets, I believe they'll be voting for those who did the right thing."

Ingrid Lindberg
Customer experience consultant, consumer psychologist, academic, professor

"For some crisis is disaster, for others it is opportunity. It is a choice most can make. Don't give up."

Dave Fish
Customer experience consultant, consumer psychologist, academic, professor

"The important thing now is to adopt the 'new normal' and adapt to make the continuation of doing 'business as usual' safe for everyone."

Shep Hyken
Customer service/experience expert, keynote speaker, author

"As firms go into survival mode and cut costs, remember to not do this at the cost of CX. Cutting costs and keeping customers happy are not mutually exclusive things. In fact, happier customers are cheaper to serve."

Amit Bhatia
Customer experience expert, senior analyst, advisor, keynote speaker

"Customer experience has never been more important than right now, because when the pandemic is finally behind us, customers will remember which companies treated them well during this difficult time."

Dan Gingiss
Customer experience coach, keynote speaker, author

"If you have a journey map, there's never been a better time to use it. During times of change when nothing seems predictable, journey maps can create stability and help you resolve points of friction, vet new processes, and envision long-term changes to keep your organization thriving while creating fewer ruined days for customers."

Jeannie Walters
Certified customer experience professional, coach, speaker

"As we emerge from COVID-19 lockdowns, CX leaders should be focusing on forging a path forward, not bouncing "back." The landscape has changed. So it's imperative to understand your customers' Moments of Truth as they are now, not as they used to be, in order to build effective solutions against those critical interactions."

Jim Tincher
Customer experience expert, journey mapper, author, speaker, entrepreneur

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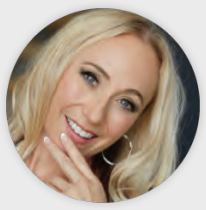
"The biggest change that I've seen during the crisis is the increased focus by CEOs in placing their employees and their health and safety above all. I hope this trend continues post-pandemic because when employees have a great experience, customers will, too."



Annette Franz
Customer experience thought leader, coach, keynote speaker, author

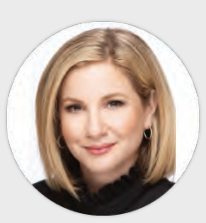
"The days of "butts in seats" as both a physical reality and a management style are OVER. Successful CX leaders will be those with the capability to engage a remote workforce, creating both an exceptional employee and customer experience with a decentralized team."

Nate Brown
Customer experience professional, speaker, author

"Stop yourself from saying 'when things return back to normal.' In reality, this is the new normal and we as CX professionals must seek to understand and adapt to the ever-changing needs, feelings, and preferences of our customers."

Jeremy Watkin
Customer service & experience professional, thought leader, speaker

"This is not the time for businesses to quiver in fear and count their losses, but be a leader in helping customers get back on their feet. Business can do this through customer experience and understanding the current customer mindset."



Blake Morgan
Customer experience futurist, keynote speaker, bestselling author

"The global crisis has taught us the power of adaptability and collaboration. If we continue to work together for the good of our organisations, whilst removing unnecessary bureaucracy, we can create leaner, more efficient, and more people (customer and employee) focused business!"

Ian Golding
Customer experience coach, keynote speaker, author

"No one can fully predict what the future holds for us now. But there is a high probability of success for the leaders who can design their services and products with deep Customer Empathy. Focusing on Customer Empathy can be a true differentiator."

Rajat Chawla
Certified customer experience mentor, CX expert, speaker, author

"I truly believe this is the time to invest in a long-term relationship with your customers. Help them with their personal worries. Become a partner in their life. Offer them emotional convenience. At the same time, understand their worries about society and find the opportunity to leverage your core strengths to add value to the world."

Steven Van Belleghem
Author, speaker, entrepreneur, academic

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TOP CX Influencers 2020

NPS® Quiz – Test Your Knowledge

Do you really understand the Net Promoter System? This 3-minute quiz is destined to make you scratch your head.

Scan me!
To take the NPS Quiz online.

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CREATING A *EUREKA* EXPERIENCE FOR CUSTOMERS

Eureka Forbes Limited is India's leading health and hygiene brand. A part of Shapoorji Pallonji Group, Eureka Forbes' product portfolio encompasses water purification, vacuum cleaning, air purification and home security solutions. It has a base of 20 million happy customers, a reach of over 1,500 cities and towns in India and a global footprint across 53 countries.

"We started with LitmusWorld as a vendor and now it is like a partner to us!"

- Shashank Sinha
Chief Transformation Officer

Leveraging technology to communicate with customers

Having understood the issues with market research, Eureka Forbes decided to leverage technology to get closer to the moment of truth (real-time) with technologies like Machine Learning and Text Analytics. This helped Eureka Forbes in capturing customer emotions and insights while they were still fresh.

Customers now provide feedback across various touchpoints such as Sales, Installation, AMC and Mandatory service requests, Call centre agent and complaint resolution. Each of these touchpoints has dedicated teams responsible for the customer's experience at that touchpoint. This highlights process gaps regularly.

Building a data culture to enhance business process outcomes

Data forms the basis of any CX transformation journey. Crippled data results in crippled outcomes. Hence, Eureka Forbes re-structured the data management practices right from the collection to the distribution and usage of the data while still ensuring data privacy.

The data culture begins by capturing the right information, from the right people. This ensures that all communications happen in real-time and are reaching the right stakeholders.

Data culture has had the following impacts on the business processes at Eureka Forbes:

- Increased vendor collaboration
- Channel optimization
- Deliverability hygiene (Both Marketing communications and SLAs)
- Identification of both small and big system gaps such as Sales Territory Management and Service delivery behaviours .

Balancing the organization between the product and the service sides of the business
Despite change management issues, a phase-wise KPI rollout has helped Eureka Forbes build trust in the system across the rganization. Right from the CEO to the front-line employees, business support functions and experience owners now benchmark their performance based on a single metric - NPS®.

Phase 1 began by measuring NPS® as a KPI only at managerial levels to ensure the front-line teams are enabled to handle issues and the right degree of support and authority is shared with the agents. After 12 months of implementing the program, the initial gaps were ironed out and the KPIs were then attached to the incentives of the experience owners.

As over 13000 field agents gained trust in the system, through transparency and authenticity of the feedback program, they were able to loop in support functions for issues that were caused due to a lack of enablement.

Strongly known for its product offerings, Eureka Forbes is now known for its services business. AMC forms a major part of the services business.

*Eureka Forbes was awarded with the **"Best Customer Experience Transformation"** title at the Customer Fest Awards 2020*

While services constitute 35% of the overall revenue, the number has been growing at a staggering 11% YoY.

In-warranty to in-contract conversion has reached 24% in the last 12 months, the contract to renewal conversions are at a whopping 75%.

Eureka Forbes has now introduced a 'DIYO – Do It Your Own' servicing Kit that leverages automation and technology, where technicians now visit the customers for servicing and complete the entire procedure within minutes by simply attaching the device to the purifier. This innovation arose from constant feedback from customers complaining about the dirt and mess created during the maintenance process.

Product Innovation and Maintaining Exclusivity

Continuous feedback and open text analysis have helped Eureka Forbes in building products that cater specifically to the needs of the customers. Water purifiers with copper coils and hot water provisions are all outcomes of customer-driven innovation.

Another method of countering fraudulent servicing practices, Eureka Forbes now equips its products with proprietory chips called 'Origa' which ensures that the products will not function without original products. And since original parts are only sold through the authorized service networks, any 3rd party vendor will not be able to service Eureka Forbes products without proper authorization.

Building an NPS® project at scale and overcoming key challenges

Commonly synonymized as the 'Aqua-guard' of India, Eureka Forbes has been driving the NPS® program across the customer journey. In its matured phase of managing this initiative for the last 4 years now, there has been a significant appreciation of the customer-first culture right down to the 5,000 frontline staff who interact with customers on a daily basis.

Measure

- Average product scores on Amazon and Flipkart have jumped from **2.4** to **4.2** in the past 12 months, with a combined positive reviews of over 15,000.
- The average response rate has **increased by almost 3X** across projects, taking the current **response rate to over 8%**
- In 4 years, Eureka Forbes has increased their overall NPS® across sales and service touchpoints by **51** points.
- The inclusion of regional languages in customer conversations have resulted in a **3% direct increase** in response rate. In 2019 alone, close to 25% of all responses are received in local languages.

The role of the CX team now revolves around recommending better processes, implementing them based on the feedback and does not just end at publishing performance reports. It is extensively involved in writing the script, training, mock calls, audit and roll out of new processes.

Act

A dedicated 25 member contact centre team close-loops with detractors to ensure query resolution. The TAT for the contact centre team is 2 hours with the promise of the first-call resolution. The same is promised to the customers the moment they give a poor rating on the NPS question on the LitmusWorld conversation screen.

EUREKA FORBES

"In the past few years improving CX through digital channels has been at the core of EFL's CRM strategy. We have enhanced our systems and processes to digitally track & monitor every aspect of our business process. This has allowed us to analyse every touchpoint to identify gaps and opportunities. EFL is dedicated towards investing continuously into the new edge technologies that help improve CX."

- Rajdeep Charan
GM CRM
& Customer Experience

Another dedicated telecalling team of 25 members ensure timely closures of open cases. The TAT for such cases is 4 hours. The telecalling team is given special powers and authorizations. They have direct access to Regional heads. If no resolution is received, they have access to business heads and if no resolution is received from business heads, they can directly approach the respective service CEOs.

Improve

- Monthly region wise detractor evaluation to identify 10 cases that scored a zero, what went wrong and who was responsible for it.
- 20% increase in data quality, resulted in web **AMC revenue of ₹4 crores** in the past 12 months.
- Due to incentivized referral programs, Eureka Forbes captures 40,000 leads annually with a **conversion rate of over 25%**.
- In 4 years, Eureka Forbes has increased their response rates across projects by almost **3X.**

Business Impact

- Due to the above-mentioned process optimizations, repeat purchases, renewals and upsells have seen a **growth of 35%** in the last 12 months.
- With monthly call volumes hovering in the 500,000 range, an 8% reduction in the overall call volumes has resulted in **cost savings of almost ₹1mn**.
- The partner attrition rate is as low as 2%
- **Annual growth** in the overall AMC base **11%**. This has resulted in an increase in the overall revenue of the **₹850 Crores** services business.
- In 4 years, Eureka Forbes has increased their overall NPS® across sales and service touchpoints by **51 points**.

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