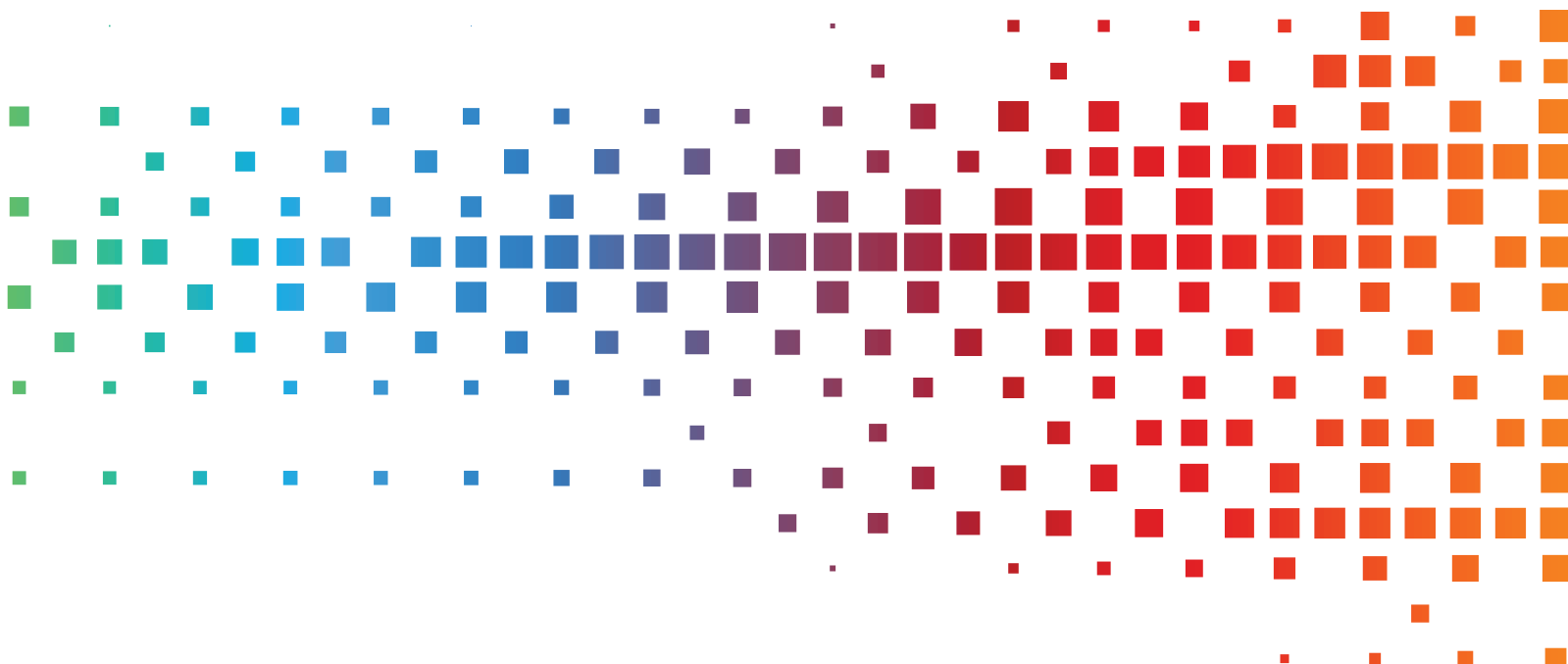


THE CONSUMER'S PERSPECTIVE

Exploring Multi-Channel Customer Care



THE CXMB SERIES EXPANDS IN SCOPE AND REACH IN 2015

The 2015 Consumer Edition marks the sixth report of the Customer Experience Management Benchmark (CXMB) Series, bringing with it deeper insights and a new perspective. As always, the consumer findings in this report have been enriched by broad participation. Last year's surveying reached more than 22,000 U.S. consumers, whereas this year's participation has grown to include more than 36,000 U.S. consumers.*

Along with the coverage and channel depth readers have come to expect, this year's research goes deeper into many new areas, including the multi-channel journey, issue resolution rates and negative customer care experiences. This year's study has also been shaped by a new research partnership with COPC Inc. A global leader in the customer experience industry, COPC Inc.'s expertise in operational performance and customer experience has enriched the understanding of changing consumer behavior and expectations related to this year's research.

This year's report features a number of entirely new survey modules focused on the customer's multi-channel journey and instances of negative customer care experiences. Additionally, some of the most interesting discoveries result from shifting trends and divergences that emerge when data points between 2014 and 2015 are compared. While the final report goes into great detail regarding these and other topics, this document provides a snapshot of findings that support these conclusions:

- Majority of consumers are taking a multi-channel approach
- Consumers prefer human interaction over automated systems
- Consumer preference is shifting back toward Traditional Care
- A greater percentage of consumers are having their expectations met

Please see the following pages for the specific survey results that fuel these conclusions.

Sincerely,

COPC Inc. and Execs In The Know



The complete 2015 Consumer Edition of the CXMB Series will be released at Execs In The Know's **Customer Response Summit Seattle**, scheduled for September 28–30. The findings will be noted throughout the conference with an in-depth review occurring on October 1 during the **CXMB Workshop**, a half-day seminar dedicated to exploring this year's results. We invite you to register to attend this exclusive event.

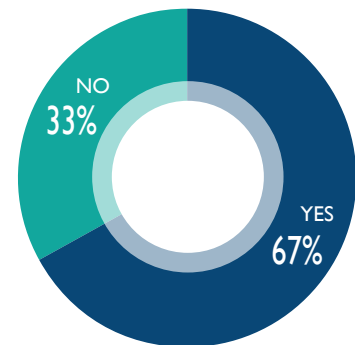
For more information, visit the Execs In The Know website at www.ExecsInTheKnow.com or the COPC Inc. website at www.COPC.com.

EXPLORING THE DIRECTION OF CUSTOMER EXPERIENCE

While this year's full report will feature an abundance of findings regarding consumer preference, experience and opinion, the following is a sampling of what proved to be the most surprising and insightful discoveries. We hope you can leverage these results as you shape your organization for greater customer success. We look forward to exploring these and other findings during **CRS Seattle** and in the **CXMB Workshop** on October 1. We hope you'll be able to join us.

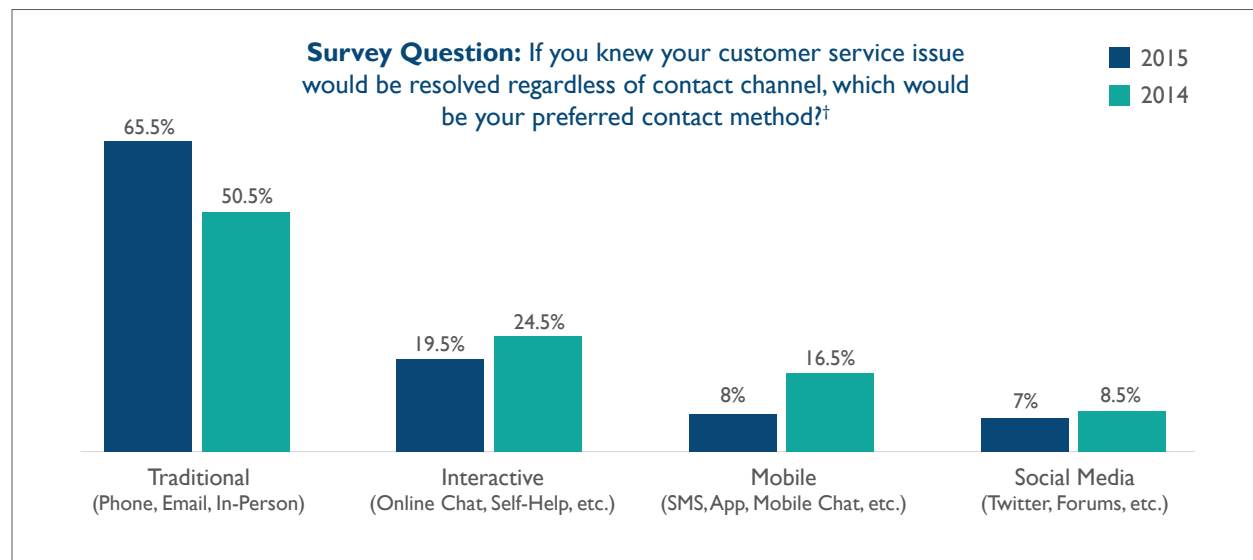
Survey Question: Within the past 12 months, did you use multiple channels (e.g., phone, email and social media) to resolve a single customer service issue?*

In a new finding for 2015, we discovered the pervasiveness of multi-channel engagements. Two-thirds of consumers who had a customer care engagement in the previous 12 months took a multi-channel approach. Additional research results showed a 75% issue resolution rate for this approach. As revealed in the complete report, this rate is higher than the combined issue resolution rate resulting from a single-channel approach.



Consumer Shift Toward Traditional Care

After years of preferential growth among the emerging channels, this year's data show a strong momentum shift toward Traditional Care channels. The strongest driver of this transition is the fact that consumers prefer to speak with a real person.



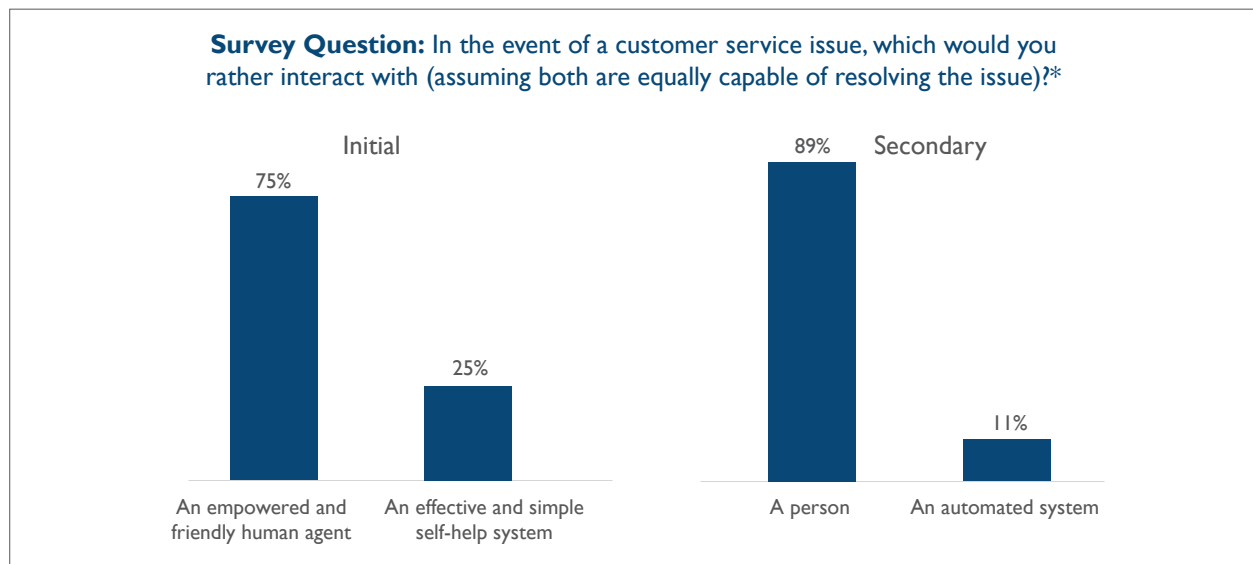
*Methodology: Conducted by Google Consumer Surveys, May 22, 2015 – June 3, 2015 and based on 769 online responses. Sample: National Adult Internet Population.

†2014 Findings: Methodology: Conducted by Google Consumer Surveys, May 12, 2014 – May 23, 2015 and based on 201 online responses. Sample: National Adult Internet Population.

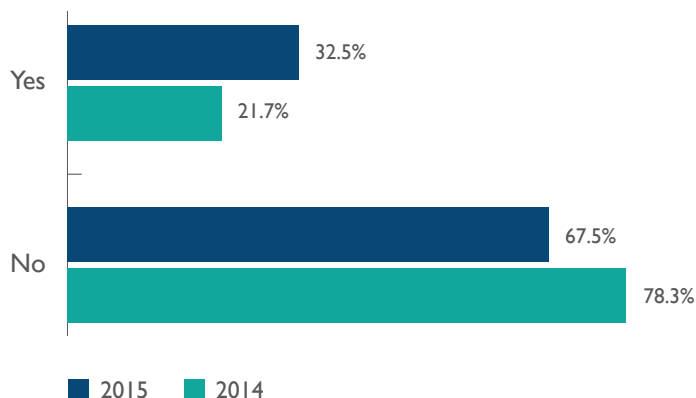
2015 Finding: Methodology: Conducted by Google Consumer Surveys, May 21, 2015 – June 3, 2015 and based on 191 online responses. Sample: National Adult Internet Population.

Customers Prefer To Talk With A Person

One of our goals this year was to develop additional insight into consumer preference for service interactions — specifically, whether consumers would rather interact with a human or an automated system. Counter to prevailing assumptions, we discovered that consumers overwhelmingly prefer to interact with a real person. Initial results proved so surprising that we ran a separate survey asking the same question, but rewording the available responses. This secondary survey strongly confirmed our initial findings.



Survey Question: Do you feel that the customer service departments of today's companies generally meet your customer service needs and expectations?†



Improved Satisfaction

Last year, we investigated consumer satisfaction with corporate customer care by asking if consumer needs and expectations were being met. This year, we asked the same question, worded in exactly the same way. While 67.5% of respondents are still not having their needs and expectations met, there was a 10-point year-over-year improvement, which is encouraging.

*Initial Finding: Methodology: Conducted by Google Consumer Surveys, May 22, 2015 – June 4, 2015 and based on 283 online responses. Sample: National Adult Internet Population. Secondary Finding: Methodology: Conducted by Google Consumer Surveys, June 16, 2015 – June 26, 2015 and based on 194 online responses. Sample: National Adult Internet Population. †2014 Findings: Methodology: Conducted by Google Consumer Surveys, May 12, 2014 – May 13, 2014 and based on 244 online responses. Sample: National Adult Internet Population. 2015 Finding: Methodology: Conducted by Google Consumer Surveys, May 21, 2015 – June 3, 2015 and based on 200 online responses. Sample: National Adult Internet Population.