IMPROVE CUSTOMER EXPERIENCE FROM PURCHASE TO RENEWAL

version 3.0 | March 2015

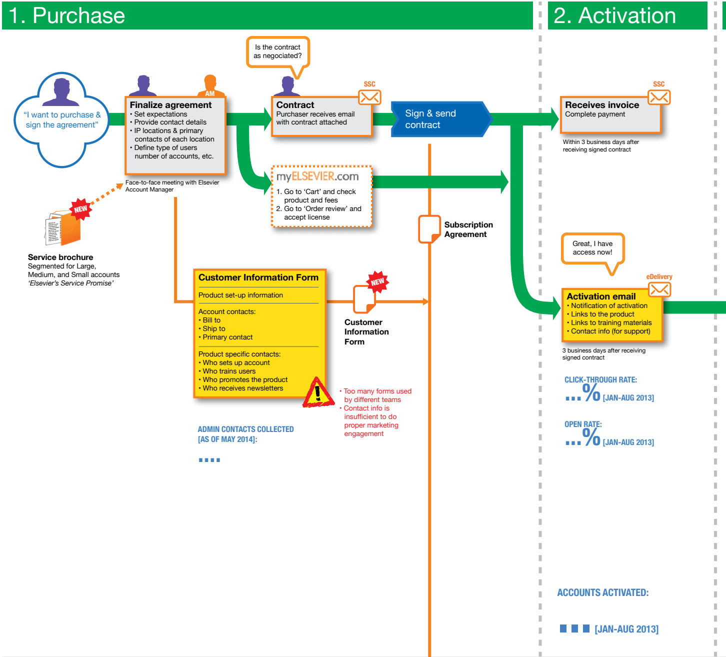
Guiding Principles

Customers experience Elsevier not only through products but through all touch-points across the whole journey

Customers want to feel that they are getting good value for money (“expensive but indispensable”)

There are different types of customer roles in the process from purchase to renewal

Customers expect Elsevier staff to work as a team (vs disjointed individuals) to solve their problems



1. Purchase

“I want to purchase & sign the agreement”

AM

Finalize agreement
- Set expectations
- Provide contact details
- IP locations & primary contacts of each location
- Define type of users number of accounts, etc.

Face-to-face meeting with Elsevier Account Manager

NEW

Service brochure
Segmented for Large, Medium, and Small accounts
‘Elsevier’s Service Promise’

Is the contract as negociated?

SSC

Contract
Purchaser receives email with contract attached

Sign & send contract

myELSEVIER.com
1. Go to ‘Cart’ and check product and fees
2. Go to ‘Order review’ and accept license

Subscription Agreement

Customer Information Form

Product set-up information

Account contacts:
- Bill to
- Ship to
- Primary contact

Product specific contacts:
- Who sets up account
- Who trains users
- Who promotes the product
- Who receives newsletters

NEW

Customer Information Form

- Too many forms used by different teams
- Contact info is insufficient to do proper marketing engagement

ADMIN CONTACTS COLLECTED [AS OF MAY 2014]:

....

2. Activation

SSC

Receives invoice
Complete payment

Within 3 business days after receiving signed contract

Great, I have access now!

eDelivery

Activation email
- Notification of activation
- Links to the product
- Links to training materials
- Contact info (for support)

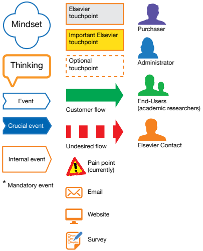
3 business days after receiving signed contract

CLICK-THROUGH RATE:
...% [JAN-AUG 2013]

OPEN RATE:
...% [JAN-AUG 2013]

ACCOUNTS ACTIVATED:

■ ■ ■ [JAN-AUG 2013]



Mindset

Thinking

Event

Crucial event

Internal event

* Mandatory event

Elsevier touchpoint

Important Elsevier touchpoint

Optional touchpoint

Customer flow

Undesired flow

Pain point (currently)

Email

Website

Survey

Purchaser

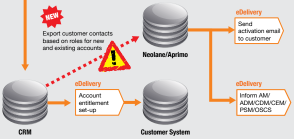
Administrator

End-Users (academic researchers)

Elsevier Contact

Internal Process

AM: Account Manager
CC: Customer Consultant
CM: Customer Marketing
CX: Customer Experience Team
Marcom: Marketing Communications
MKTG: Marketing
OSCS: Online Solutions Customer Services
RAR: Research and Academic Relations
SSC: Sales Support Coordinator
SSM: Solution Sales Manager



NEW

Export customer contacts based on roles for new and existing accounts

CRM

eDelivery

Account entitlement set-up

Customer System

Neolane/Aprimo

eDelivery

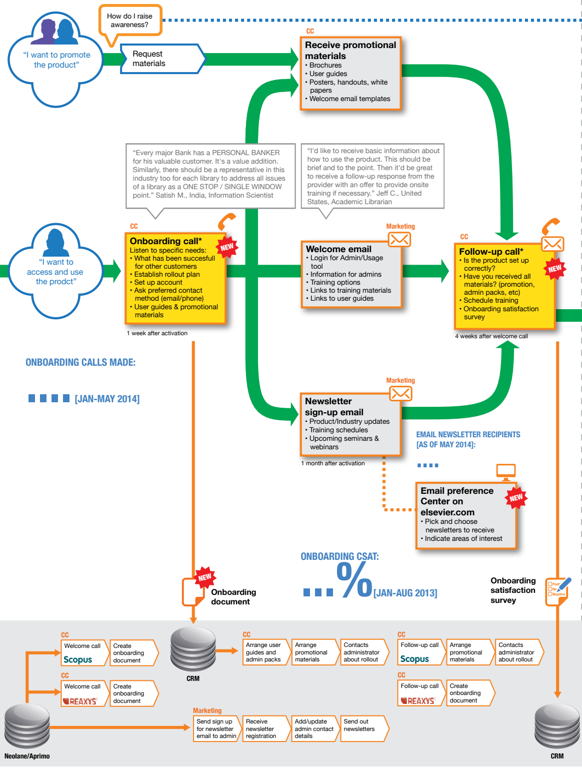
Send activation email to customer

eDelivery

Inform AM/ ADM/CDM/CEM/ PSM/OSCS

Elsevier Experience map | May 2014 | Copyright ©2014 Elsevier. Created by Customer Experience Strategy and UCD, **Customer Experience Managers:** ya.adachi@elsevier.com, **UX Specialist:** r.peeringa@elsevier.com

3. Onboarding



“I want to promote the product”

How do I raise awareness?

Request materials

CC

Receive promotional materials
- Brochures
- User guides
- Posters, handouts, white papers
- Welcome email templates

“Every major Bank has a PERSONAL BANKER for his valuable customer. It's a value addition. Similarly, there should be a representative in this industry too for each library to address all issues of a library as a ONE STOP / SINGLE WINDOW point.” Satish M., India, Information Scientist

“I'd like to receive basic information about how to use the product. This should be brief and to the point. Then it'd be great to receive a follow-up response from the provider with an offer to provide onsite training if necessary.” Jeff C., United States, Academic Librarian

“I want to access and use the prodct”

CC

Onboarding call*
NEW
Listen to specific needs:
- What has been succesfull for other customers
- Establish rollout plan
- Set up account
- Ask preferred contact method (email/phone)
- User guides & promotional materials

1 week after activation

Marketing

Welcome email
- Login for Admin/Usage tool
- Information for admins
- Training options
- Links to training materials
- Links to user guides

CC

Follow-up call*
NEW
- Is the product set up correctly?
- Have you received all materials? (promotion, admin packs, etc)
- Schedule training
- Onboarding satisfaction survey

4 weeks after welcome call

ONBOARDING CALLS MADE:

■ ■ ■ ■ [JAN-MAY 2014]

Marketing

Newsletter sign-up email
- Product/Industry updates
- Training schedules
- Upcoming seminars & webinars

1 month after activation

EMAIL NEWSLETTER RECIPIENTS [AS OF MAY 2014]:

■■■■

Email preference Center on elsevier.com
NEW
- Pick and choose newsletters to receive
- Indicate areas of interest

ONBOARDING CSAT:

■■■% [JAN-AUG 2013]

NEW
Onboarding document

Onboarding satisfaction survey

CC
Welcome call Scopus → Create onboarding document

CC
Welcome call REAXYS → Create onboarding document

CRM

CC
Arrange user guides and admin packs → Arrange promotional materials → Contacts administrator about rollout

CC
Follow-up call Scopus → Arrange promotional materials → Contacts administrator about rollout

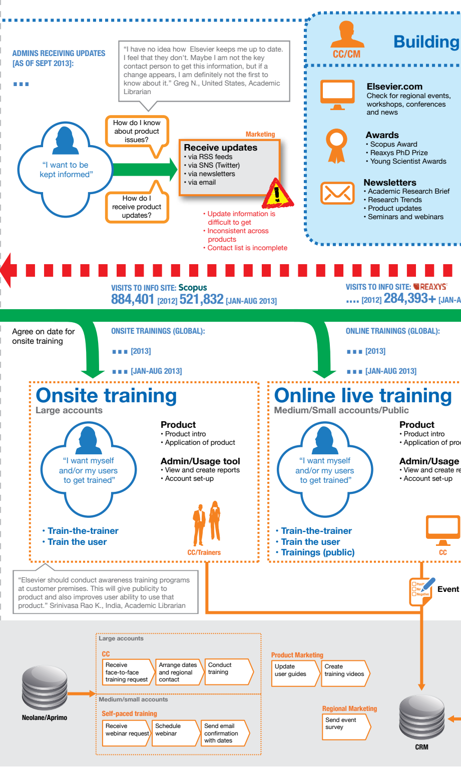
CC
Follow-up call REAXYS → Create onboarding document

Marketing
Send sign up for newsletter email to admin → Receive newsletter registration → Add/update admin contact details → Send out newsletters

Neolane/Aprimo

CRM

4. Customer Education & Training



ADMINS RECEIVING UPDATES [AS OF SEPT 2013]:

■■■

“I have no idea how Elsevier keeps me up to date. I feel that they don't. Maybe I am not the key contact person to get this information, but if a change appears, I am definitely not the first to know about it.” Greg N., United States, Academic Librarian

“I want to be kept informed”

How do I know about product issues?

How do I receive product updates?

Marketing

Receive updates
- via RSS feeds
- via SNS (Twitter)
- via newsletters
- via email

- Update information is difficult to get
- Inconsistent across products
- Contact list is incomplete

CC/CM

Building

Elsevier.com
Check for regional events, workshops, conferences and news

Awards
- Scopus Award
- Reaxys PhD Prize
- Young Scientist Awards

Newsletters
- Academic Research Brief
- Research Trends
- Product updates
- Seminars and webinars

VISITS TO INFO SITE: Scopus
884,401 [2012] 521,832 [JAN-AUG 2013]

VISITS TO INFO SITE: REAXYS
.... [2012] 284,393+ [JAN-A

Agree on date for onsite training

ONSITE TRAININGS (GLOBAL):
■■■ [2013]
■■■ [JAN-AUG 2013]

ONLINE TRAININGS (GLOBAL):
■■■ [2013]
■■■ [JAN-AUG 2013]

Onsite training

Large accounts

“I want myself and/or my users to get trained”

Product
- Product intro
- Application of product

Admin/Usage tool
- View and create reports
- Account set-up

- **Train-the-trainer**
- **Train the user**

CC/Trainers

Online live training

Medium/Small accounts/Public

“I want myself and/or my users to get trained”

Product
- Product intro
- Application of pro

Admin/Usage
- View and create re
- Account set-up

- **Train-the-trainer**
- **Train the user**
- **Trainings (public)**

CC

“Elsevier should conduct awareness training programs at customer premises. This will give publicity to product and also improves user ability to use that product.” Srinivasa Rao K., India, Academic Librarian

Event

Neolane/Aprimo

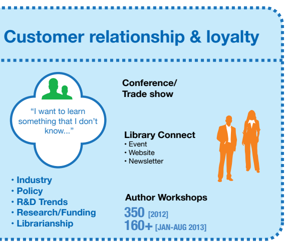
Large accounts
CC
Receive face-to-face training request → Arrange dates and regional contact → Conduct training

Medium/small accounts
Self-paced training
Receive webinar request → Schedule webinar → Send email confirmation with dates

Product Marketing
Update user guides → Create training videos

Regional Marketing
Send event survey

CRM



Customer relationship & loyalty

“I want to learn something that I don’t know...”

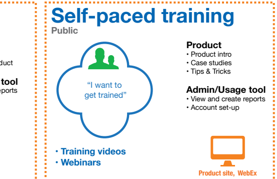
Conference/ Trade show

Library Connect
- Event
- Website
- Newsletter

- Industry
- Policy
- R&D Trends
- Research/Funding
- Librarianship

Author Workshops
350 [2012]
160+ [JAN-AUG 2013]

UG 2013]



Self-paced training

Public

“I want to get trained”

duct

tool
eports

Product
- Product intro
- Case studies
- Tips & Tricks

Admin/Usage tool
- View and create reports
- Account set-up

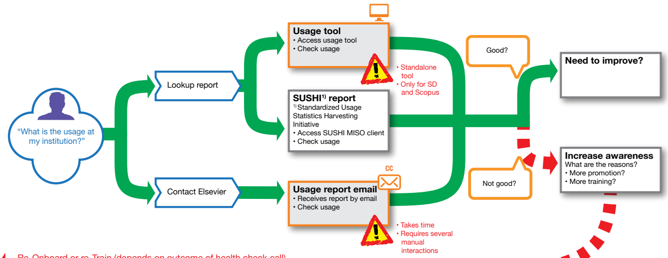
- Training videos
- Webinars

Product site, WebEx

survey

In Product, Training Desk surveys

5. Health-Checks (after 4 months & 8 months)



“What is the usage at my institution?”

Lookup report

Contact Elsevier

Usage tool
- Access usage tool
- Check usage

- Standalone tool
- Only for SD and Scopus

SUSHI[1] report
[1] Standardized Usage Statistics Harvesting Initiative
- Access SUSHI MISO client
- Check usage

CC

Usage report email
- Receives report by email
- Check usage

- Takes time
- Requires several manual interactions

Good?

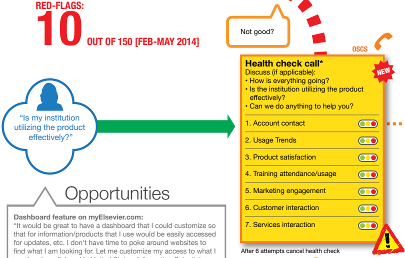
Need to improve?

Not good?

Increase awareness
What are the reasons?
- More promotion?
- More training?

Re-Onboard or re-Train (depends on outcome of health check call)

RED-FLAGS:
10 OUT OF 150 [FEB-MAY 2014]



“Is my institution utilizing the product effectively?”

Not good?

OSCS

Health check call*
NEW
Discuss (if applicable):
- How is everything going?
- Is the institution utilizing the product effectively?
- Can we do anything to help you?

1. Account contact
2. Usage Trends
3. Product satisfaction
4. Training attendance/usage
5. Marketing engagement
6. Customer interaction
7. Services interaction

After 6 attempts cancel health check

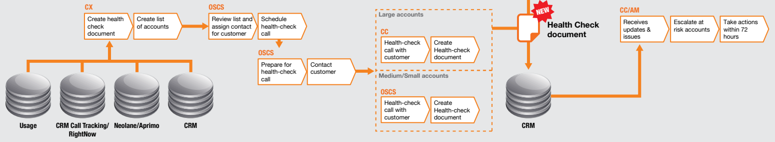
- Takes long time to prepare for the call
- Preparation is not standardized

HEALTH-CHECKS COMPLETED:
150 [AS OF MAY 2014]

Opportunities

Dashboard feature on myElsevier.com:
“It would be great to have a dashboard that I could customize so that for information/products that I use would be easily accessed for updates, etc. I don't have time to poke around websites to find what I am looking for. Let me customize my access to what I need and use.” Jean H., United States, Information Scientist

“Ebsco has a great administrative tool that allows me to get stats, set up database details, vary search results, and much much more. It gives me control of how I want Corban University's Ebsco to look and work.” Garret T., USA, Academic, Librarian



CX
- Create health check document
- Create list of accounts

OSCS
- Review list and assign contact for customer
- Schedule health-check call

OSCS
- Prepare for health-check call
- Contact customer

Large accounts
CC
- Health-check call with customer
- Create Health-check document

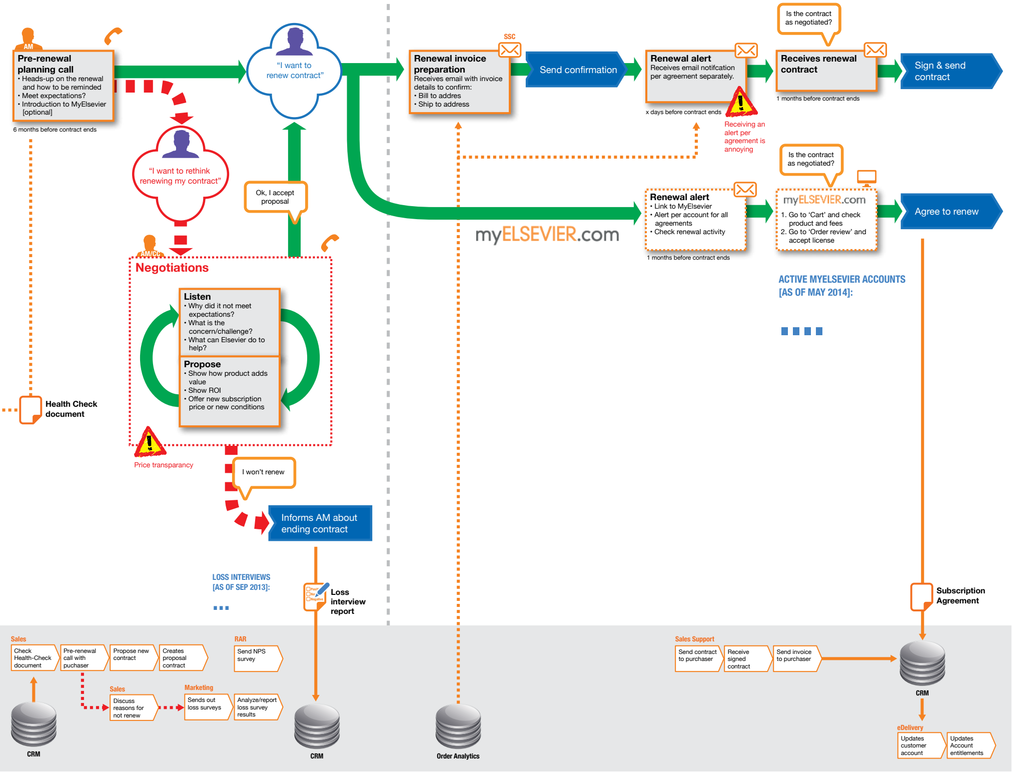
Medium/Small accounts
OSCS
- Health-check call with customer
- Create Health-check document

NEW
Health Check document

CC/AM
- Receives updates & issues
- Escalate at risk accounts
- Take actions within 72 hours

6. Pre-renewal (6 months prior to renewal)

7. Renewal



AM

Pre-renewal planning call
- Heads-up on the renewal and how to be reminded
- Meet expectations?
- Introduction to MyElsevier [optional]

6 months before contract ends

"I want to renew contract"

"I want to rethink renewing my contract"

Ok, I accept proposal

AM/CC

Negotiations

Listen
- Why did it not meet expectations?
- What is the concern/challenge?
- What can Elsevier do to help?

Propose
- Show how product adds value
- Show ROI
- Offer new subscription price or new conditions

Price transparancy

Health Check document

I won't renew

Informs AM about ending contract

LOSS INTERVIEWS
[AS OF SEP 2013]:

■■■

Loss interview report

SSC

Renewal invoice preparation
Receives email with invoice details to confirm:
- Bill to addres
- Ship to address

Send confirmation

Renewal alert
Receives email notifcation per agreement separately.

x days before contract ends

Receiving an alert per agreement is annoying

Is the contract as negotiated?

Receives renewal contract

1 months before contract ends

Sign & send contract

myELSEVIER.com

Renewal alert
- Link to MyElsevier
- Alert per account for all agreements
- Check renewal activity

1 months before contract ends

Is the contract as negotiated?

myELSEVIER.com
1. Go to 'Cart' and check product and fees
2. Go to 'Order review' and accept license

Agree to renew

ACTIVE MYELSEVIER ACCOUNTS
[AS OF MAY 2014]:

■■■■

Subscription Agreement

Sales
- Check Health-Check document
- Pre-renewal call with puchaser
- Propose new contract
- Creates proposal contract

RAR
- Send NPS survey

Sales
- Discuss reasons for not renew

Marketing
- Sends out loss surveys
- Analyze/report loss survey results

CRM

CRM

Order Analytics

Sales Support
- Send contract to purchaser
- Receive signed contract
- Send invoice to purchaser

CRM

eDelivery
- Updates customer account
- Updates Account entitlements

Global Customer Services

user centered design