# AI BIZ GURU - Customer Experience

## Sample Input Data

### 1. Customer Satisfaction Metrics

### Core Customer Experience KPIs

| Metric | Your Company | Industry Average | Competitor A | Competitor B | Competitor C |
|---|---|---|---|---|---|
| Net Promoter Score (NPS) | 48 | 32 | 45 | 38 | 27 |
| Customer Satisfaction (CSAT) | 8.4/10 | 7.6/10 | 8.1/10 | 7.9/10 | 7.2/10 |

| | Your Company | Industry Average | Competitor A | Competitor B | Competitor C |
|---|---|---|---|---|---|
| Customer Effort Score (CES) | 5.8/7 | 5.1/7 | 5.4/7 | 5.6/7 | 4.9/7 |
| First Contact Resolution | 76% | 68% | 72% | 65% | 74% |
| Average Response Time | 3.5 hours | 8.2 hours | 5.7 hours | 4.2 hours | 9.5 hours |

## NPS Breakdown by Customer Segment

| Segment | Your Company | Industry Average | Competitor A | Competitor B | Competitor C |
|---|---|---|---|---|---|
| Enterprise | 52 | 38 | 48 | 41 | 32 |
| Mid-Market | 47 | 33 | 42 | 39 | 28 |
| Small Business | 41 | 28 | 37 | 35 | 25 |
| New Customers (<1yr) | 43 | 30 | 40 | 36 | 26 |
| Established (1-3yrs) | 49 | 34 | 46 | 40 | 29 |

| | | | | | |
|---|---|---|---|---|---|
| Mature (>3yrs) | 55 | 37 | 51 | 42 | 31 |

## CSAT Scores by Touchpoint

| Touchpoint | Your Company | Industry Average | Competitor A | Competitor B | Competitor C |
|---|---|---|---|---|---|
| Sales Process | 8.2/10 | 7.5/10 | 8.0/10 | 7.8/10 | 7.1/10 |
| Onboarding | 7.9/10 | 7.2/10 | 7.6/10 | 7.4/10 | 6.8/10 |
| Product Usage | 8.5/10 | 7.7/10 | 8.2/10 | 8.0/10 | 7.3/10 |
| Technical Support | 8.6/10 | 7.4/10 | 8.0/10 | 7.7/10 | 7.5/10 |
| Billing/Administration | 7.8/10 | 7.0/10 | 7.5/10 | 7.3/10 | 6.7/10 |
| Account Management | 8.7/10 | 7.5/10 | 8.3/10 | 7.9/10 | 7.2/10 |

## Customer Loyalty Metrics

| Metric | Your Company | Industry Average | Competitor A | Competitor B | Competitor C |
|---|---|---|---|---|---|

| | | | | | |
|---|---|---|---|---|---|
| Customer Retention Rate | 92% | 84% | 89% | 87% | 81% |
| Customer Churn Rate | 8% | 16% | 11% | 13% | 19% |
| Repeat Purchase Rate | 73% | 62% | 68% | 65% | 58% |
| Customer Lifetime Value | $185,000 | $135,000 | $168,000 | $152,000 | $122,000 |
| Average Relationship Duration | 4.8 years | 3.2 years | 4.1 years | 3.8 years | 2.9 years |
| Expansion Revenue Rate | 114% | 108% | 112% | 110% | 105% |

## 2. Customer Journey Mapping

## Journey Stage Performance

| Journey Stage | Satisfaction | Effort Score | Importance | Pain Points | Improvement Priority |
|---|---|---|---|---|---|

| | | | | | |
|---|---|---|---|---|---|
| **Awareness** | 7.4/10 | 5.2/7 | 8/10 | Limited content accessibility | Medium-High |
| **Evaluation** | 7.8/10 | 5.5/7 | 9/10 | Complex pricing structure | High |
| **Purchase** | 8.3/10 | 5.8/7 | 9/10 | Contract negotiation length | Medium |
| **Onboarding** | 7.9/10 | 4.8/7 | 10/10 | Technical setup complexity | Very High |
| **Product Usage** | 8.5/10 | 6.1/7 | 10/10 | Advanced feature discovery | Medium |
| **Support** | 8.6/10 | 5.9/7 | 8/10 | After-hours availability | Low |
| **Renewal/Expansion** | 8.4/10 | 5.7/7 | 9/10 | Upgrade path clarity | Medium-High |

**Customer Journey Emotional Mapping**

| Journey Stage | Positive Emotions | Negative Emotions | Net Emotional Score |
|---|---|---|---|
| **Awareness** | Curious (58%), Interested (62%) | Confused (32%), Overwhelmed (24%) | +64% |
| **Evaluation** | Hopeful (65%), Engaged (58%) | Uncertain (38%), Hesitant (35%) | +50% |
| **Purchase** | Confident (72%), Excited (68%) | Anxious (25%), Pressured (22%) | +93% |
| **Onboarding** | Optimistic (64%), Motivated (60%) | Frustrated (35%), Confused (30%) | +59% |
| **Product Usage** | Satisfied (75%), Empowered (68%) | Challenged (28%), Disappointed (18%) | +97% |
| **Support** | Relieved (72%), Grateful (68%) | Annoyed (22%), Impatient (25%) | +93% |
| **Renewal/Expansion** | Loyal (70%), Valued (65%) | Uncertain (25%), Considering Alternatives (22%) | +88% |

**Touchpoint Experience Metrics**

| Touchpoint | Frequency | Satisfaction | Importance | Channel Preference |
|---|---|---|---|---|
| Website | 85% | 8.1/10 | 9/10 | Desktop (65%), Mobile (35%) |
| Sales Rep Interaction | 92% | 8.2/10 | 8/10 | Video Call (45%), Phone (35%), In-person (20%) |
| Demo/Trial | 78% | 8.3/10 | 9/10 | Live Demo (58%), Self-guided (42%) |
| Implementation | 100% | 7.9/10 | 10/10 | In-person (42%), Remote (58%) |
| Training | 85% | 8.0/10 | 8/10 | Live Online (52%), Self-paced (38%), In-person (10%) |
| Technical Support | 72% | 8.6/10 | 9/10 | Chat (45%), Email (30%), Phone (25%) |
| Account Review | 68% | 8.7/10 | 7/10 | Video Call (72%), In-person (18%), Phone (10%) |

**Journey Friction Points**

| Friction Point | Impact Score (1-10) | Affected Customers | Resolution Rate | Time to Resolution |
|---|---|---|---|---|
| Complex implementation process | 8.2 | 45% | 85% | 3.5 weeks |
| Difficulty finding relevant documentation | 7.4 | 62% | 78% | 2.3 days |
| Integration with legacy systems | 8.7 | 38% | 72% | 4.2 weeks |
| Feature discovery challenges | 6.8 | 52% | 90% | 1.8 weeks |
| Billing/invoice confusion | 6.5 | 28% | 95% | 3.2 days |
| User permission management | 7.2 | 35% | 88% | 1.5 weeks |
| Reporting customization complexity | 7.8 | 42% | 82% | 2.1 weeks |

## 3. Support & Service Performance

### Support Channel Performance

| Channel | Volume (%) | Resolution Rate | First Contact Resolution | Average Resolution Time | CSAT |
|---|---|---|---|---|---|
| Phone | 25% | 92% | 78% | 18 minutes | 8.5/10 |
| Email | 32% | 95% | 65% | 4.2 hours | 8.2/10 |
| Live Chat | 28% | 91% | 82% | 12 minutes | 8.7/10 |
| Self-Service | 12% | 85% | 95% | 8 minutes | 7.9/10 |
| Community Forum | 3% | 78% | 55% | 3.5 hours | 7.5/10 |

### Support Issue Analysis

| Issue Category | Volume (%) | Avg. Resolution Time | Repeat Rate | Customer Impact Score | Self-Service Potential |
|---|---|---|---|---|---|

| Product Usage | 35% | 22 minutes | 12% | 7.2/10 | High |
| --- | --- | --- | --- | --- | --- |
| Technical Issues | 28% | 45 minutes | 18% | 8.5/10 | Medium |
| Integration Problems | 15% | 3.2 hours | 21% | 8.7/10 | Low |
| Account/Billing | 12% | 28 minutes | 8% | 6.8/10 | High |
| Feature Requests | 10% | N/A | N/A | 5.5/10 | N/A |

## Support Team Performance

| Metric | Your Team | Industry Benchmark | Year-Over-Year Change |
| --- | --- | --- | --- |
| Cases per Agent | 245/month | 285/month | -5% |
| Average Handle Time | 16 minutes | 22 minutes | -12% |
| Agent Utilization | 78% | 82% | +3% |

| Training Hours | 15 hours/month | 8 hours/month | +25% |
|---|---|---|---|
| Knowledge Base Updates | 32/month | 18/month | +45% |
| Agent Satisfaction | 8.5/10 | 7.2/10 | +8% |
| Agent Turnover | 12% | 22% | -15% |

## Service Level Agreements (SLAs)

| Priority Level | Target Response | Actual Response | Target Resolution | Actual Resolution | SLA Compliance |
|---|---|---|---|---|---|
| Critical (P1) | 15 minutes | 12 minutes | 4 hours | 3.2 hours | 97% |
| High (P2) | 1 hour | 45 minutes | 8 hours | 6.5 hours | 95% |
| Medium (P3) | 4 hours | 2.8 hours | 24 hours | 18 hours | 93% |
| Low (P4) | 8 hours | 5.5 hours | 72 hours | 48 hours | 98% |

## 4. Voice of Customer Analysis

## Customer Feedback Sentiment Analysis

| Feedback Category | Volume | Positive | Neutral | Negative | Net Sentiment | Trend (YoY) |
|---|---|---|---|---|---|---|
| Product Features | 42% | 68% | 22% | 10% | +58% | +12% |
| Ease of Use | 35% | 72% | 18% | 10% | +62% | +8% |
| Performance/Reliability | 28% | 75% | 15% | 10% | +65% | +15% |
| Customer Support | 25% | 82% | 12% | 6% | +76% | +5% |
| Value for Money | 22% | 65% | 20% | 15% | +50% | -3% |
| Implementation | 18% | 58% | 25% | 17% | +41% | +10% |
| Documentation | 15% | 55% | 28% | 17% | +38% | +18% |

## Top Positive Themes

| Theme | Frequency | Customer Segment | Impact on Loyalty | Competitive Advantage |
|---|---|---|---|---|
| Intuitive user interface | 72% | All segments | High | Strong |

| Theme | Frequency | Customer Segment | Impact on Churn | Improvement Priority |
|---|---|---|---|---|
| Responsive customer support | 68% | SMB, Mid-market | Very High | Very Strong |
| Feature reliability | 65% | Enterprise | High | Moderate |
| Time-saving automation | 62% | All segments | High | Strong |
| Comprehensive reporting | 58% | Mid-market, Enterprise | Moderate | Moderate |
| Integration capabilities | 55% | Enterprise | High | Weak |
| Regular product updates | 52% | All segments | Moderate | Moderate |

## Top Negative Themes

| Theme | Frequency | Customer Segment | Impact on Churn | Improvement Priority |
|---|---|---|---|---|
| Advanced feature complexity | 42% | SMB | Moderate | Medium |
| Implementation time | 38% | Mid-market, Enterprise | High | High |

| | | | | |
|---|---|---|---|---|
| Mobile experience limitations | 35% | All segments | Low | Medium |
| Integration documentation | 32% | Enterprise | Moderate | High |
| Pricing structure complexity | 28% | SMB, Mid-market | High | High |
| Advanced reporting complexity | 25% | Enterprise | Low | Low |
| Feature request responsiveness | 22% | All segments | Moderate | Medium |

## Customer Verbatim Highlights

| Category | Positive Verbatim | Negative Verbatim |
|---|---|---|
| **Product** | "The dashboard provides exactly the insights we need at a glance. Couldn't run our business without it." | "Some advanced features feel buried in the interface. Took us months to discover functionality we were already paying for." |
| **Support** | "Support team consistently goes above and beyond. They don't just solve problems; they | "Wait times for specialized technical help can be lengthy during peak hours. More 24/7 coverage would be appreciated." |

|  | educate our team in the process." |  |
| --- | --- | --- |
| **Onboarding** | "The structured implementation process saved us weeks of trial and error. Worth every penny of the professional services fee." | "Implementation took nearly twice as long as initially estimated. Better scoping and planning would have helped set expectations." |
| **Value** | "ROI was evident within the first quarter. We've increased efficiency by 35% while reducing errors by over 40%." | "The value is there, but the pricing structure makes it difficult to predict costs as we scale. More transparency would help with budgeting." |
| **Integration** | "Once set up, the integrations work flawlessly. Data flows exactly where it needs to without manual intervention." | "Documentation for API integrations is outdated in several areas. Our developers had to use trial and error for some endpoints." |

## Feature Request Analysis

| Feature Request | Request Frequency | Customer Impact | Development Complexity | Competitive Necessity | Priority Score |
| --- | --- | --- | --- | --- | --- |
| Enhanced mobile app | 68% | 8/10 | Medium | High | 85/100 |

| Advanced workflow automation | 62% | 9/10 | High | Medium | 82/100 |
|---|---|---|---|---|---|
| Custom dashboard builder | 58% | 7/10 | Medium | High | 78/100 |
| AI-powered insights | 52% | 8/10 | Very High | Medium | 74/100 |
| Expanded integration ecosystem | 48% | 9/10 | High | Very High | 88/100 |
| Offline mode capabilities | 42% | 6/10 | High | Low | 65/100 |
| Enhanced data visualization | 38% | 7/10 | Medium | Medium | 72/100 |

## 5. Customer Experience Program Metrics

## Experience Improvement Initiatives

| Initiative | Investment | Customer Impact | ROI | Status | Timeline |
|---|---|---|---|---|---|

| | | | | | |
|---|---|---|---|---|---|
| Self-service portal enhancement | $420,000 | +15% CSAT | 285% | Completed | Q1 2024 |
| Journey mapping & optimization | $350,000 | +12% NPS | 220% | In Progress | Q2-Q3 2025 |
| Support team expansion | $680,000 | -35% response time | 180% | Completed | Q4 2024 |
| Knowledge base redesign | $290,000 | +28% self-service | 312% | In Progress | Q2 2025 |
| Voice of customer program | $385,000 | +18% retention | 245% | Ongoing | Q1 2024-Present |
| Mobile experience overhaul | $520,000 | +25% mobile engagement | 195% | Planning | Q3-Q4 2025 |
| Customer success program | $450,000 | +22% expansion revenue | 275% | In Progress | Q1-Q3 2025 |

**Experience Program Maturity Assessment**

| Dimension | Maturity Score (1-5) | Industry Average | Gap | Priority |
|---|---|---|---|---|
| Strategy & Leadership | 4.2 | 3.1 | +1.1 | Low |
| Voice of Customer | 3.8 | 2.9 | +0.9 | Medium |
| Experience Design | 3.5 | 3.0 | +0.5 | Medium |
| Metrics & Measurement | 4.3 | 3.2 | +1.1 | Low |
| Governance & Accountability | 3.6 | 2.8 | +0.8 | Medium |
| Culture & Mindset | 4.0 | 3.0 | +1.0 | Low |
| Technology & Tools | 3.7 | 3.3 | +0.4 | High |

**Customer Experience ROI**

| Metric | Pre-CX Program | Current | Change | Financial Impact |
|---|---|---|---|---|
| Customer Retention | 84% | 92% | +8% | +$3.8M annual revenue |
| Referral Business | 18% | 26% | +8% | +$2.2M annual revenue |
| Support Cost per Customer | $420/yr | $345/yr | -$75/yr | +$1.5M annual savings |
| Customer Lifetime Value | $142,000 | $185,000 | +$43,000 | +$8.6M lifetime value |
| Expansion Revenue | 105% | 114% | +9% | +$2.7M annual revenue |
| Support Ticket Volume | 3200/mo | 2450/mo | -750/mo | +$1.2M annual savings |
| Sales Cycle Length | 68 days | 52 days | -16 days | +$1.8M opportunity cost |

## 6. Customer Experience Competitive Benchmarking

**Competitive Experience Comparison**

| Experience Dimension | Your Company | Industry Average | Leader | Laggard |
|---|---|---|---|---|
| Overall CX Score | 8.4/10 | 7.6/10 | 8.8/10 | 6.5/10 |
| Digital Experience | 8.2/10 | 7.8/10 | 9.1/10 | 6.8/10 |
| Human Touchpoints | 8.7/10 | 7.4/10 | 8.9/10 | 6.3/10 |
| Personalization | 7.8/10 | 7.0/10 | 8.6/10 | 5.9/10 |
| Omnichannel Consistency | 7.5/10 | 6.8/10 | 8.5/10 | 5.5/10 |
| Emotional Connection | 8.3/10 | 7.1/10 | 8.7/10 | 6.0/10 |
| Problem Resolution | 8.6/10 | 7.3/10 | 8.8/10 | 6.2/10 |

**Customer Experience Competitive Positioning**

| Competitor | CX Positioning | Primary CX Strength | Primary CX Weakness | NPS | CSAT |
|---|---|---|---|---|---|
| Your Company | CX Leader | Support quality | Mobile experience | 48 | 8.4/10 |

| Competitor A | CX Leader | Product usability | Implementation | 45 | 8.1/10 |
| Competitor B | CX Performer | Onboarding process | Technical support | 38 | 7.9/10 |
| Competitor C | CX Laggard | Feature breadth | Overall experience | 27 | 7.2/10 |
| Competitor D | CX Performer | Self-service | Personalization | 35 | 7.8/10 |
| Industry Average | - | - | - | 32 | 7.6/10 |

## Experience Innovation Comparison

| Innovation Area | Your Company | Competitor A | Competitor B | Competitor C |
|---|---|---|---|---|
| AI-powered support | Advanced | Advanced | Basic | None |
| Predictive customer service | Moderate | Advanced | Basic | None |
| Personalization technology | Basic | Moderate | Basic | Basic |

| | | | | |
|---|---|---|---|---|
| Omnichannel integration | Moderate | Moderate | Advanced | Basic |
| Self-service capabilities | Advanced | Moderate | Basic | Moderate |
| Customer success automation | Advanced | Moderate | Moderate | Basic |
| Experience analytics | Moderate | Advanced | Moderate | Basic |

## 7. Customer Segment Analysis

### Experience by Customer Segment

| Segment | NPS | CSAT | Retention | CLV | Primary Needs | Key Pain Points |
|---|---|---|---|---|---|---|
| Enterprise | 52 | 8.6/10 | 94% | $320K | Scalability, Security, Integration | Implementation complexity, Advanced customization |
| Mid-Market | 47 | 8.4/10 | 91% | $185K | Flexibility, Growth support, ROI | Feature discovery, Pricing structure, Training resources |

| Segment | | | | | | |
|---|---|---|---|---|---|---|
| SMB | 41 | 8.1/10 | 87% | $95K | Ease of use, Quick value, Affordability | Technical complexity, Limited resources, Support accessibility |
| Financial Services | 49 | 8.5/10 | 93% | $240K | Compliance, Security, Reliability | Integration complexity, Custom reporting, Advanced controls |
| Healthcare | 46 | 8.3/10 | 92% | $210K | Compliance, Patient data, Workflow | Implementation time, Specialized features, Training requirements |
| Retail | 45 | 8.2/10 | 90% | $175K | Omnichannel, Real-time data, Scalability | Seasonal demands, Integration ecosystem, Mobile capabilities |
| Manufacturing | 43 | 8.0/10 | 89% | $195K | Reliability, Process automation, Integration | Legacy systems, Complex workflows, Specialized reporting |

**Segment Journey Variations**

| Journey Stage | Enterprise | Mid-Market | SMB |
|---|---|---|---|
| **Evaluation** | POC-driven (12-16 weeks) | Feature comparison (6-8 weeks) | Demo-driven (2-4 weeks) |
| **Purchase** | Committee decision (8+ approvers) | Team decision (3-5 approvers) | Owner decision (1-2 approvers) |
| **Implementation** | Full-service (8-12 weeks) | Guided implementation (4-6 weeks) | Self-implementation (2-3 weeks) |
| **Onboarding** | Multi-phase, custom training | Standard training + workshops | Self-service + standard training |
| **Support** | Dedicated TAM + priority support | Standard support + success calls | Standard support |
| **Expansion** | Strategic account planning | Quarterly business reviews | Feature-based upselling |

## Segment-Specific Experience Gaps

| Segment | Experience Gap | Gap Score | Business Impact | Improvement Priority |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| Enterprise | Integration ecosystem breadth | -28% | High | Very High |
| Enterprise | Advanced customization capabilities | -22% | High | High |
| Mid-Market | Implementation resource requirements | -25% | Medium | High |
| Mid-Market | Pricing structure complexity | -18% | High | Medium |
| SMB | Technical complexity for limited resources | -32% | Very High | High |
| SMB | Self-service capability gaps | -20% | Medium | Medium |
| All Segments | Mobile experience limitations | -25% | Medium | High |

## 8. Employee Experience Impact

### Employee-Customer Experience Correlation

| Employee Metric | Score | Customer Impact | Correlation | Trend |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| Employee Engagement | 8.2/10 | +1.2 CSAT points | 0.78 | ↑ |
| Employee Turnover | 14% | -0.8 CSAT points per 5% increase | 0.72 | ↓ |
| Training Hours | 68 hrs/yr | +0.5 CSAT points per 20 hrs | 0.65 | ↑ |
| Internal NPS | 42 | +0.7 customer NPS points per 10 points | 0.81 | ↑ |
| Knowledge Accessibility | 7.8/10 | +0.9 FCR points | 0.75 | ↑ |
| Tool Satisfaction | 7.5/10 | +0.8 AHT improvement | 0.68 | ↑ |
| Leadership Trust | 8.0/10 | +0.6 CSAT points | 0.72 | ↑ |

## Customer-Facing Employee Experience

| Team | Employee NPS | Engagement | Knowledge Score | Training Quality | Tool Effectiveness | Turnover Rate |
|---|---|---|---|---|---|---|
| Sales | 38 | 7.8/10 | 7.5/10 | 7.2/10 | 6.8/10 | 18% |

| | | | | | | |
|---|---|---|---|---|---|---|
| Implementation | 45 | 8.0/10 | 8.2/10 | 8.0/10 | 7.5/10 | 15% |
| Customer Support | 52 | 8.5/10 | 8.7/10 | 8.6/10 | 7.2/10 | 12% |
| Customer Success | 48 | 8.3/10 | 8.5/10 | 8.2/10 | 7.5/10 | 13% |
| Technical Support | 44 | 8.1/10 | 8.8/10 | 8.5/10 | 7.0/10 | 14% |
| Account Management | 46 | 8.2/10 | 8.0/10 | 7.8/10 | 7.3/10 | 16% |

## Employee Experience Gaps

| Gap Area | Current State | Desired State | Business Impact | Improvement Priority |
|---|---|---|---|---|
| Support tool integration | Multiple disconnected systems | Unified platform | High | High |
| Knowledge management | Fragmented, often outdated | Centralized, current, AI-assisted | Very High | Very High |

| | | | | |
|---|---|---|---|---|
| Cross-team collaboration | Siloed information | Transparent, collaborative | Medium | Medium |
| Customer context visibility | Limited view across touchpoints | Complete customer journey visibility | High | High |
| Training consistency | Varies by team and location | Standardized, outcome-focused | Medium | Medium |
| Feedback loop closure | Inconsistent follow-through | Systematic closing of loops | High | Medium |
| Empowerment to resolve issues | Constrained by policies | Judgment-based resolution authority | High | High |