

The Impact of Client Perception on Your Revenue

The Goal

Discover how accurately account managers assess the quality of their relationships and the impact of those relationships on revenue.

The Findings

Account managers underestimate and overestimate the quality of their relationships significantly.

The Outcome

Account managers that underestimate their relationships miss out on revenue and when they overestimate they lose revenue.

The Approach

Encompass-CX issued surveys and collected customer data from account managers and their clients using our Customer Experience Management application.

Based on feedback data from an 8 question survey about loyalty, our application captured the health of each relationship and gave clients a CX score.

Placing clients into 1 of 4 segments, as listed below:

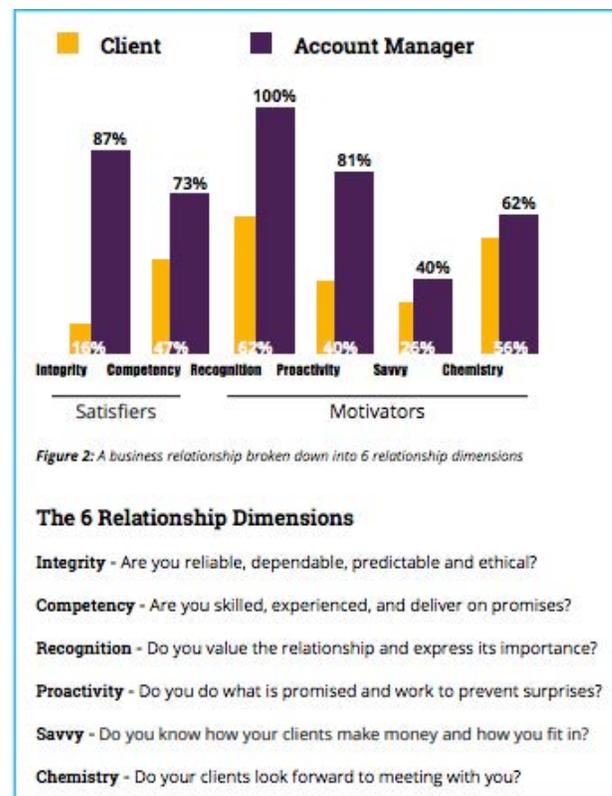


From there, account managers and clients answered a series of questions designed to measure the strength of their business relationships across 6 relationship dimensions.

The feedback from both sides was analyzed and given numeric values across each relationship dimension

Our Relationship Dimensions

Every business relationship is broken down into 6 relationship dimensions, as shown in figure 2.



About Encompass-CX

We offer a scalable software application that collects, measures and distributes customer data and provides clarity into all aspects of a company's accounts, products and service teams making it easier for businesses to gain real-time visibility into revenue, renewals and retention. Contact us at encompass-cx.com / 844-254-4604 / info@encompass-cx.com



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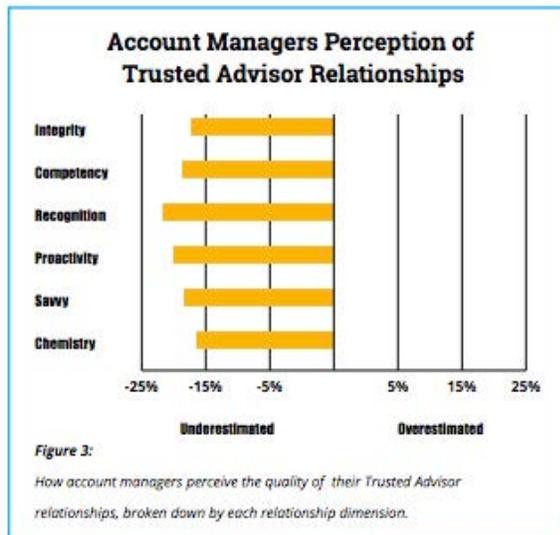
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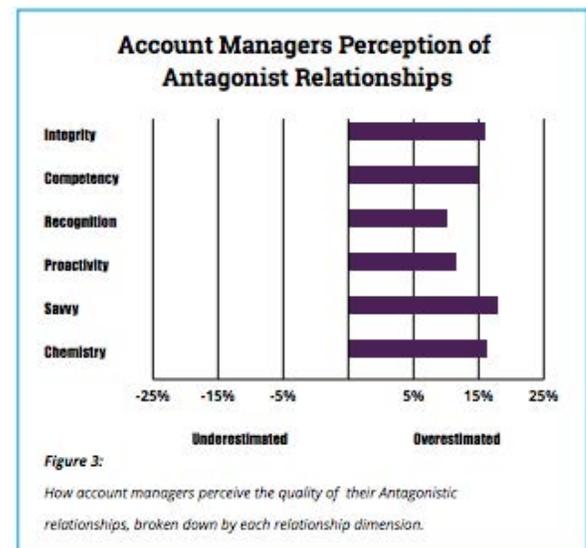
What We Found

Our findings told a dramatic story about business relationships scored as **Trusted Advisor** and **Antagonistic**. We found a trend in how account managers perceived the health of their relationships.

- They underestimated the quality of *Trusted Advisor relationships* by 18%
- They overestimated the quality of *Antagonistic relationships* by 14%



Differences in **Predisposed** and **Transactional** relationships were minor, which suggests that managers accurately reported the quality of those relationships.



The Outcome

When account managers **underestimate** the quality of their valuable relationships they are less likely to approach these clients for up-sell and cross-sell opportunities. Conversely, when account managers **overestimate** the quality of their weakest relationships they risk recognizing client issues and preventing churn with real-time actionable solutions.

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