

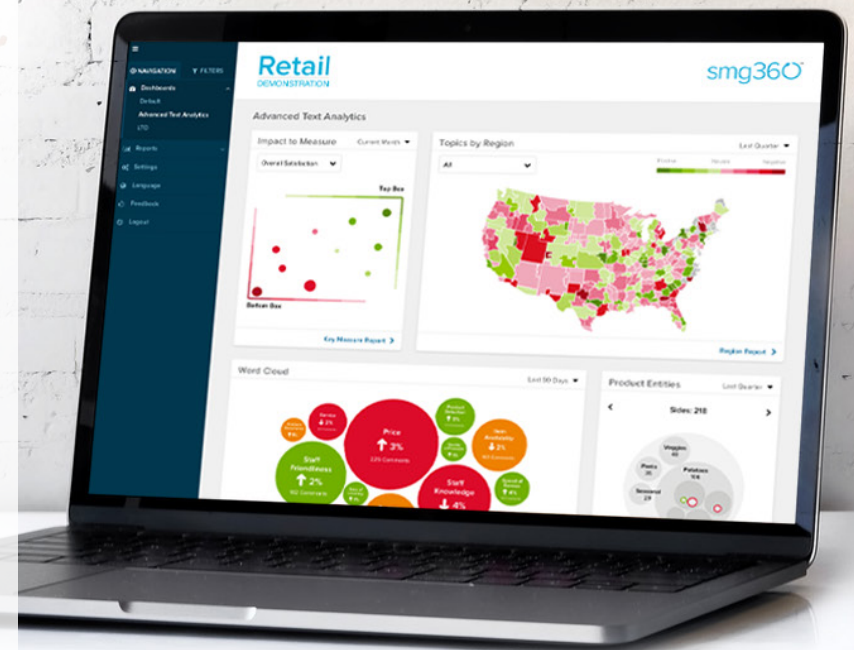
BEST PRACTICE GUIDE

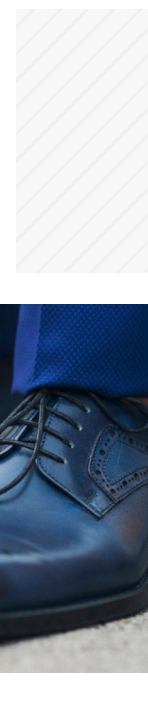
From customer comments to critical context

6 ways text analytics delivers better insights for better business outcomes



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The vast amount of unstructured data makes text analytics essential

With rapid investment in customer experience management (CEM) platforms, leading brands know the quickest path to growth starts with listening to customers. But an increasingly complex customer journey spanning multiple touchpoints—many with distinct feedback channels—can make surfacing actionable insights seem like a daunting task.

To drive real change, brands require enterprise-level platforms that translate mountains of data into targeted insights that drive business outcomes—consistently and efficiently. And with customers growing weary of lengthy surveys asking about every aspect of their experience, open-ended comments offer enormous potential for streamlining the feedback-to-insight process.

But just because brands know it's important doesn't mean they're doing it effectively.

ONLY
40%

of CX pros say they
quantify unstructured
text feedback*



Most text analytics technologies either can't handle the volume and complexity of the data being processed or they're so convoluted that it's difficult to know where to start. More than ever, brands need robust, intuitive tools designed with end users in mind — especially when it comes to input as complicated as the unstructured data found in customer comments.

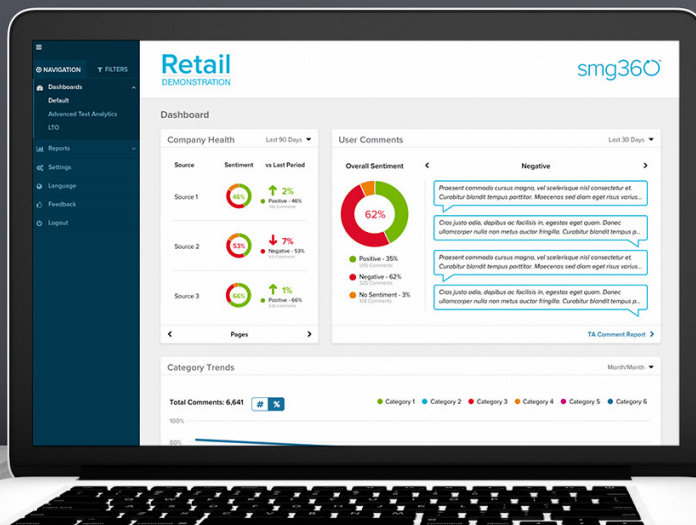
To help you unveil the insights hiding in unstructured data, this best practice guide breaks down 6 ways to use text analytics tools to drive meaningful changes that lead to positive outcomes.

* The AI Revolution in CX Measurement | Forrester | August 2018

What's inside

With intuitive text analytics technology driven by data science, the smg360® reporting platform lets users:

- 1 Get a high-level read of recurring topics + changing sentiment across your enterprise
- 2 See which topics are trending so you know where to focus attention
- 3 Navigate changes in the conversation across regions with interactive heat maps
- 4 Create custom groupings for more targeted roll-up + drill-down analyses
- 5 Understand how product + service mentions correlate to performance on key measures
- 6 Use predictive analytics to stay ahead of low-frequency, high-impact events



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**Don't have a text analytics tool yet?
Start here.**

If you're still trying to decide which text analytics software solution is right for your brand, download the best practice guide to determine the elements that are critical to success—and how to assess them.



Glossary of Terms

Before delving into the “how-to,” it may help to brush up on the “what’s that?” for some of the technical terms used in this best practice guide

Artificial intelligence (AI)—Advanced computer systems that are able to perform tasks that normally require human intelligence, such as visual perception, speech recognition, decision-making, and translation between languages

Customer experience management (CEM)—The collection of processes a company uses to track, oversee, and organize every interaction between a customer and the organization throughout the customer life cycle

Entity ontology—A set of concepts and categories in a domain that shows their properties and the relations between them; in regards to text analytics, entity ontologies are used to tag + categorize the products and services mentioned in customer comments so that they align with a brand’s internal product hierarchy

Machine learning—The scientific study of algorithms and statistical models that computer systems use to effectively perform a specific task without using explicit instructions, relying on patterns and inference instead

Predictive analytics—The use of data, statistical algorithms, and machine-learning techniques to identify the likelihood of future outcomes based on historical data; the goal is to go beyond knowing what has happened to providing a best assessment of what will happen in the future

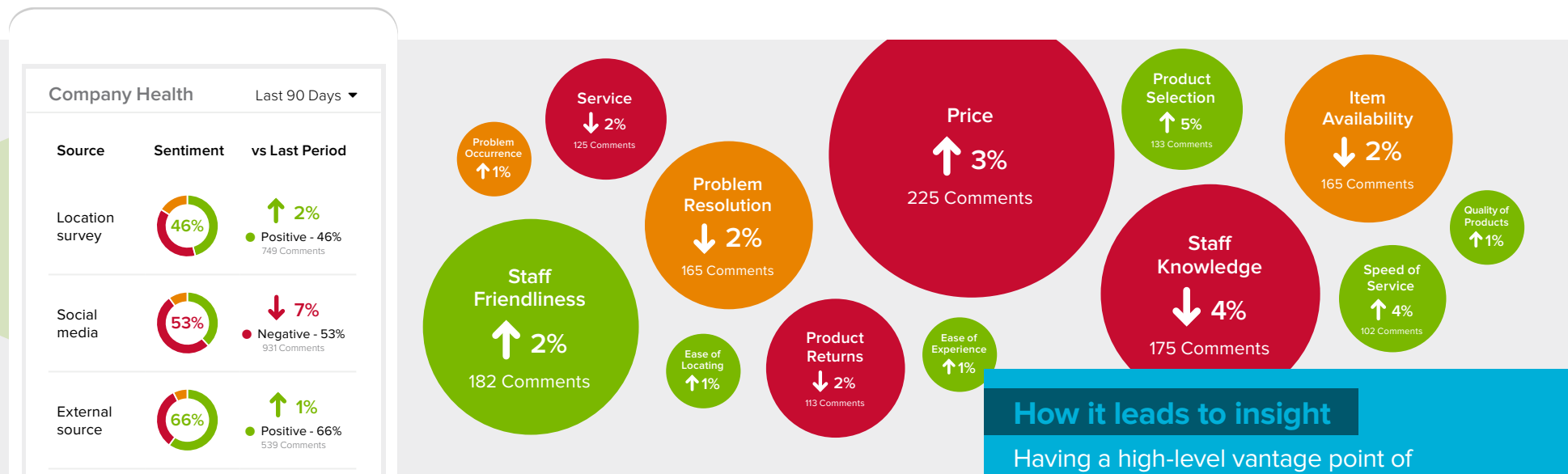
Sentiment analysis—The process of computationally identifying and categorizing opinions expressed in a piece of text, especially in order to determine whether the attitude towards a particular topic, product, etc. is positive, negative, or neutral

Text analytics—The process of converting unstructured text data into meaningful data for analysis, to measure customer opinions, product reviews, feedback, sentiment analysis, and entity modeling to support fact-based decision-making

Voice of the customer (VoC)—A term that describes the customer’s feedback about their experiences with, and expectations for, a brand’s products or services

Company health + word clouds

Get a high-level read of recurring topics + changing sentiment across your enterprise



Before diving in to see what actions to take, it helps to get a handle on what consumers are talking about and how they feel about it. With company health reports fed by multiple channels, executive users get a quick glimpse into the sentiment behind comments across all feedback channels—as well as how that changes over time.

To go a click deeper and gain insight on specific channels and locations/regions, easy-to-read word clouds provide users:

- ▶ Recurring topics + accompanying sentiment
- ▶ Period-over-period comparisons on frequency of mentions
- ▶ Total volume of comments relating to each category

How it leads to insight

Having a high-level vantage point of the cross-channel conversation makes it easier to keep tabs on what's being talked about—and how those topics color the experience.

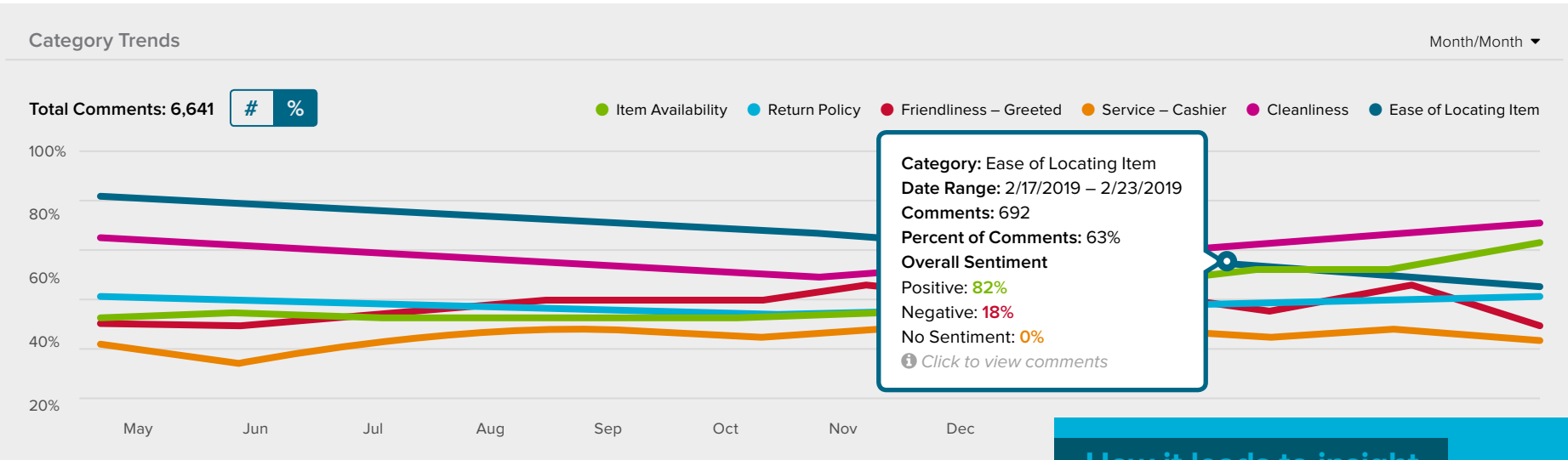
These tools serve as a definitive starting point on the path to insight. That means each layer of additional analysis is informed by an upfront understanding of how consumers feel about your brand.

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Trends

See which topics are trending so you know where to focus your attention



The benefit of insights derived from open-ended comments can seem like a double-edged sword. On one hand, they'll help you answer questions you never thought to ask. On the other, the sheer diversity in topics being discussed can be overwhelming. Fortunately, SMG's text analytics technology uses machine learning techniques to comb each

comment, cross-check them with others for similar themes, and bring you the topics that warrant further investigation.

With up to 2 years of historical comments and weekly, monthly, and quarterly trend lines, users get a real-time read into which categories bubble to the surface over specific time periods. And with

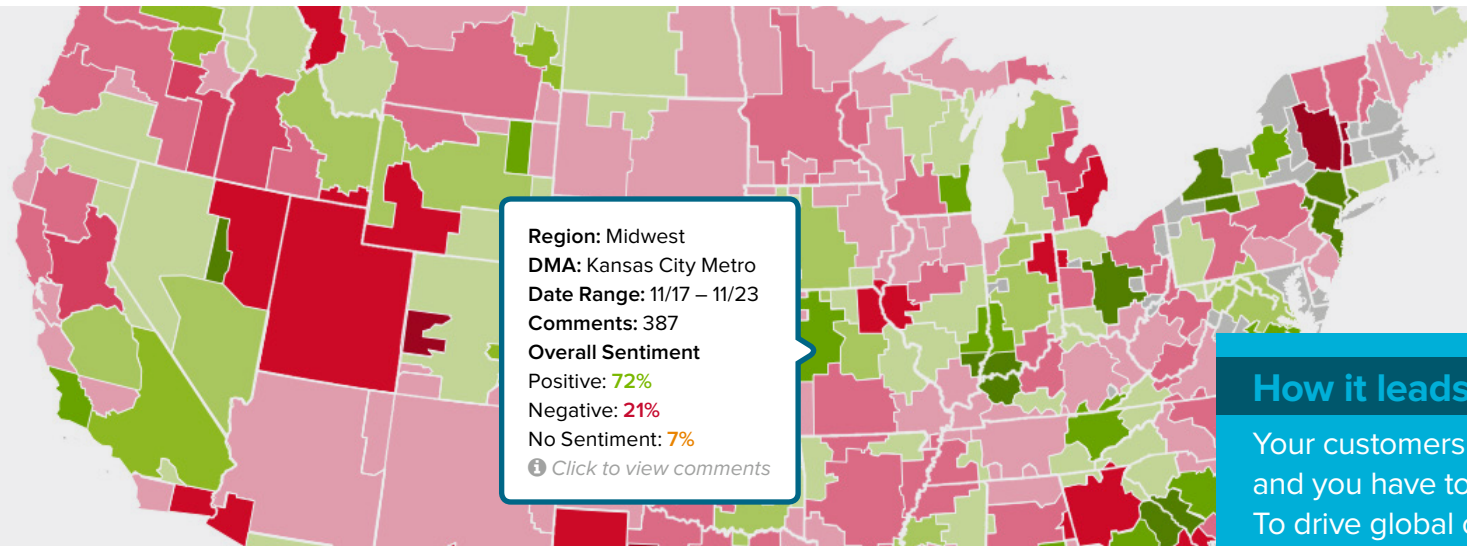
How it leads to insight

By highlighting emerging topics before they become widespread issues, trend reports help brands avoid getting caught off guard.

prominent callouts for the percentage of relevant comments, total volume, and sentiment breakdown for each category, it's that much easier to prioritize next steps.

Topics by region

Navigate changes in the customer conversation across regions with interactive heat maps



How it leads to insight

Your customers can be all over the map — and you have to be right there with them. To drive global consistency, use text analytics technology to highlight where experiences lag expectations.

There's no such thing as a uniform brand experience. Whether it's an influx of cleanliness-related comments due to customers tracking in snow or supplier issues causing regional drops in taste scores, topics vary across markets. And it can be hard to balance striving for brand-wide consistency with pinpointing those specific areas of opportunity.

Interactive heat maps enable users to:

- ▶ Identify the regions where sentiment dips
- ▶ Hover over areas of interest for quick insight
- ▶ Drill down into specific categories to take informed action

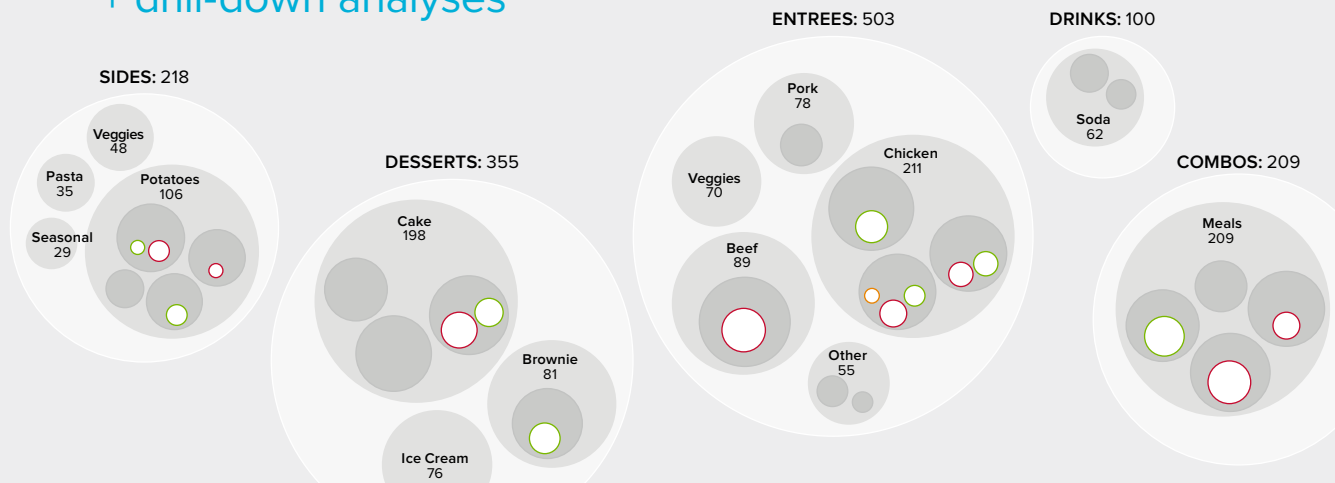
With a full view of the customer experience across your geographic footprint, you can catch regional variances in perception and know exactly where to narrow your focus.

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Product entities

Create custom groupings for more targeted roll-up
+ drill-down analyses



Unlike the quantitative data you're collecting through the CEM survey, findings from unstructured data doesn't always fit into a neat little box. More often, they're spread across the wide array of products, services, and initiatives you're trying to track—which means you need to ensure they align with how you're tracking them.

That's where custom entity ontologies come in. Entity ontologies essentially serve as brand-specific encyclopedias—

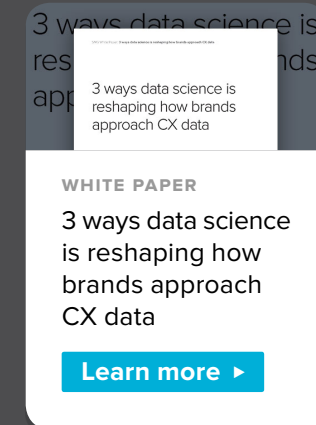
ensuring the lingo consumers use lines up with your own terminology.

With customizable comment groupings, users can:

- ▶ Tag + group comments according to brand-specific product hierarchies
- ▶ Isolate categories + subcategories of interest for deeper analysis
- ▶ Refine areas of focus to keep customer satisfaction trending upward

Don't let insights get lost in translation

With deep learning models and natural language processing, data science innovations have produced sophisticated text analytics engines that account for variations in respondent phrasing—so you can accurately catch + categorize every product or service mention.



How it leads to insight

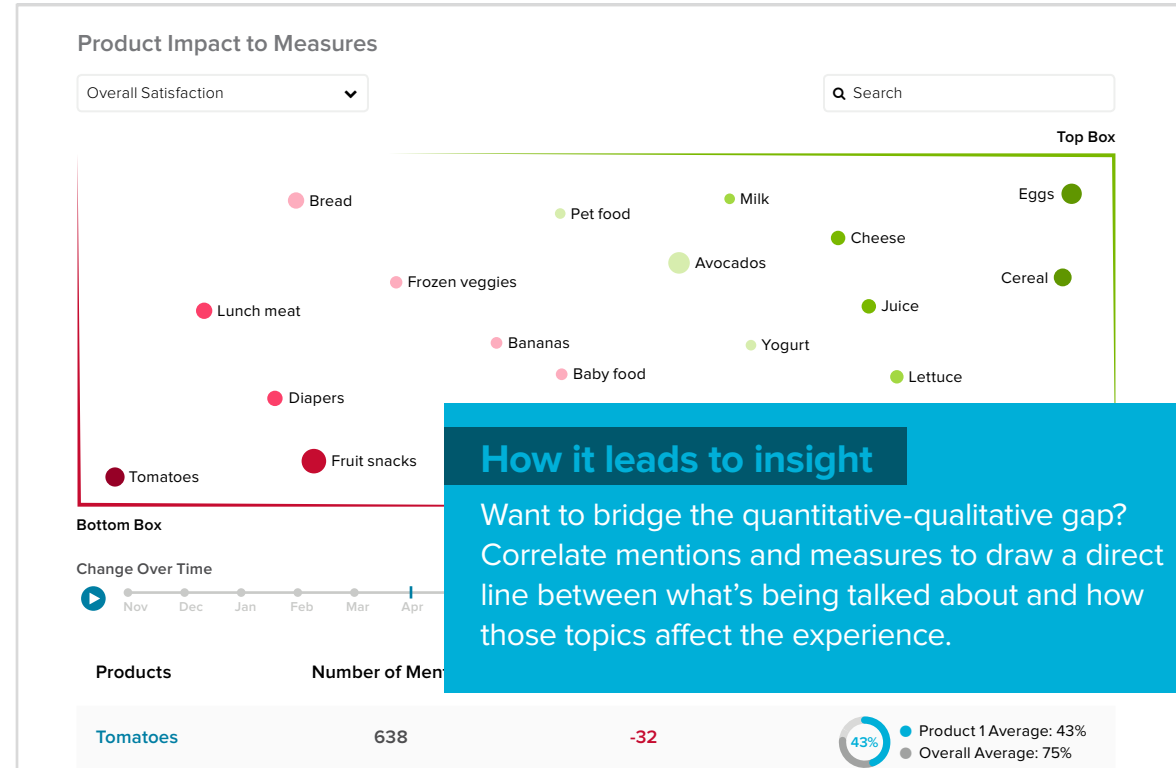
Feedback only translates to action if you and your customers speak the same language. With customizable entity ontologies, you can be sure comments are in line with your product strategies.

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Product impact to measures

Understand how product + service mentions correlate to performance on key measures



How it leads to insight

Want to bridge the quantitative-qualitative gap? Correlate mentions and measures to draw a direct line between what's being talked about and how those topics affect the experience.

Just like survey scores don't exist in a vacuum, neither do comments — and you need to understand the relationship between both to get the full picture. Every iteration of the customer experience offers an opportunity to gain a more nuanced understanding of where to improve.

Whether it's specific products, new service standards, or recent operational changes, noting when customers call out those experiential variables — and more importantly, understanding how they impact important measures — is mission-critical to building an innovation strategy that resonates.

This report enables users to:

- ▶ Understand how product mentions correlate to Overall Satisfaction, loyalty metrics, + KPIs
- ▶ Track frequency of mentions to gauge success of new products + services to forecast demand
- ▶ Right-size product innovation strategies to ever-evolving customer expectations

AI-based alerts

Use predictive analytics to stay ahead of low-frequency, high-impact events

Store #221:

Foodborne Illness Alert

For some reason this visit I got sick.
The only difference in my order today
was a fruit cup. I am sorry to say I got
sick to my stomach.



Store #1622:

Out of Stock Alert

They didn't have the shoe I was
looking for even though they carry it
online. I had to go across town to a
different store.



Recent

- SMG360 now
1010 - NORTH LAKELAND
Foreign Object Alert
- SMG360 now
1246 - JEFFERSON
Foreign Object Alert

While every comment matters, some carry more weight than others—especially when they pertain to issues that rarely pop up. While things like foodborne illness, employee misconduct, and operational hazards may only appear once in tens of thousands of comments, identifying and addressing those issues is paramount.

Advanced text analytics tools enable brands to identify and alert on low-occurrence, high-impact events. Even more importantly, the AI technology identifies the mentions in real time and—depending on the scope of the issue—triggers the appropriate actions. Whether it's providing managers with relevant coaching information or diagnosing and relaying potentially system-wide issues to central customer care teams, AI-based alerts keep brands one step ahead.

How it leads to insight

Don't let red flags make headlines. With increasingly sophisticated cognitive technologies, AI-based alerts let you catch, characterize, and resolve timely issues before they land your brand in the (wrong kind of) news.

You don't have to go it alone

Even with the most robust reporting technologies at your disposal, few are successful when they set out on the path to insight alone. That's because it takes more than tools and technical know-how to spark the kinds of meaningful changes that demonstrate program ROI. It takes an intimate knowledge of the business, deep industry expertise, and an ever-evolving understanding of what makes customers tick.

That's why more and more brands that embrace change are transitioning from CX data vendors to full-fledged customer insight partners.

No other end-to-end CEM provider combines platform technology and professional services to deliver actionable insights like SMG.

With a unique model that puts a dual focus on technology and services, SMG's dedicated client insight teams collaborate every step of the way to transform open-ended feedback across channels into unified plans of action that deliver tangible results.

About Service Management Group

SMG inspires experiences that improve people's lives. We are a catalyst for change, providing actionable customer, patient, and employee insights that boost loyalty and drive business outcomes. Our unique model puts a dual focus on platform technology and professional services—making it easier to collect, analyze, and share feedback and behavioral data across the enterprise. To learn more about our customer experience management, employee experience, and brand research solutions, visit www.smg.com.

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Interested in how SMG's text analytics technology can help boost loyalty and improve business performance? Visit **smg.com/contact-us** to schedule a demo.



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