



Product Design & Customer Service Assessment

Meta Informatix's *Product Design & Customer Service Assessment* helps an organization identify, define and position products and services to meet customer needs and expectations, and develop and implement strategies to improve business processes, products and customer service standards. The information that is gained from the assessment process helps identify and define measurable outcomes that are linked to the organization's strategic business goals, objectives and processes. More importantly, the defined outcomes can be tracked and monitored over time.

Accordingly, Meta Informatix's *Product Design & Customer Service Assessment* is an important process for developing strategic information for an organization's Strategic Plan and Annual Performance Plans (see Meta Informatix's *Strategic Planning & Performance Assessment Consulting Service*).

Meta Informatix Product Design & Customer Service Assessment Model™

Meta Informatix has developed a **Product Design & Customer Service Assessment Model™**, which serves as the company's framework for visualizing and understanding all of the relationships among the major components that must be considered to transform the way an organization develops products and provides quality service to its customers. Exhibit A depicts our **Product Design & Customer Service Assessment Model™** and identifies the relationships among the key components in its framework.

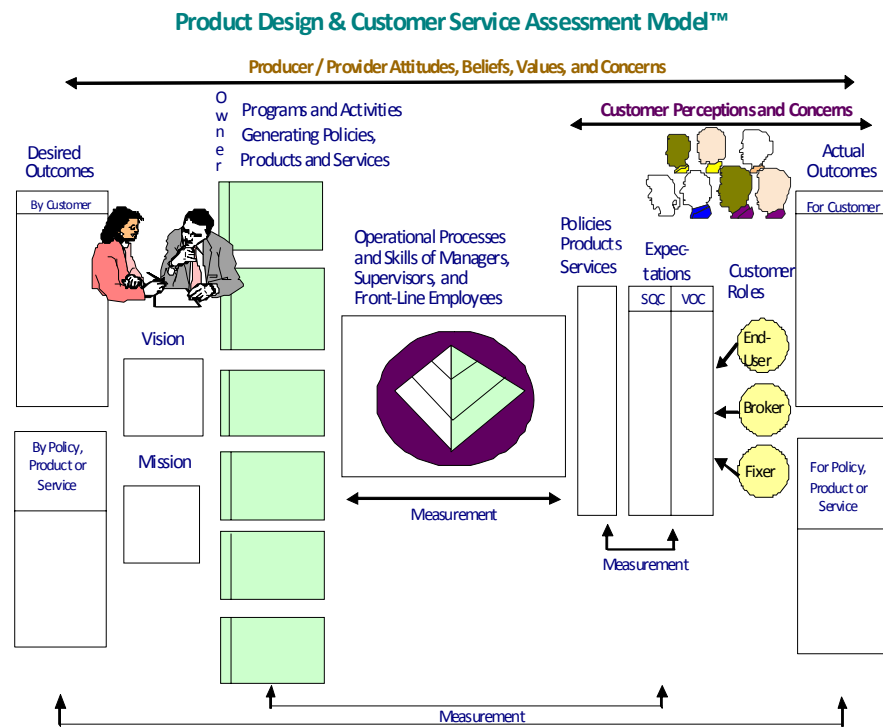
1. Outcomes (desired and actual, end and intermediate)
2. Shared vision of the organization
3. Mission of the organization
4. Program activities that generate source products and services
5. Operational processes
6. Policies, products and services
7. Policy, product and service attributes and quality expectations
8. Customers

The linkages that connect these key components are depicted in Meta Informatix' **Product Design & Customer Service Assessment Model™**. The components of the model identify and define the attitudes, beliefs, values and concerns of those that produce and provide products and/or services to customers. In addition, it identifies and defines the policies of the organization that govern how products and services are developed and provided to the customer. Each component of the model is related to and influenced by customer perceptions and concerns about an organization's policy, products and services.

The **Product Design & Customer Service Assessment Model™** also recognizes that customers can play more than one role relative to the producer and/or service provider; namely, the roles of end-user, broker, and fixer of company policy, products and services.

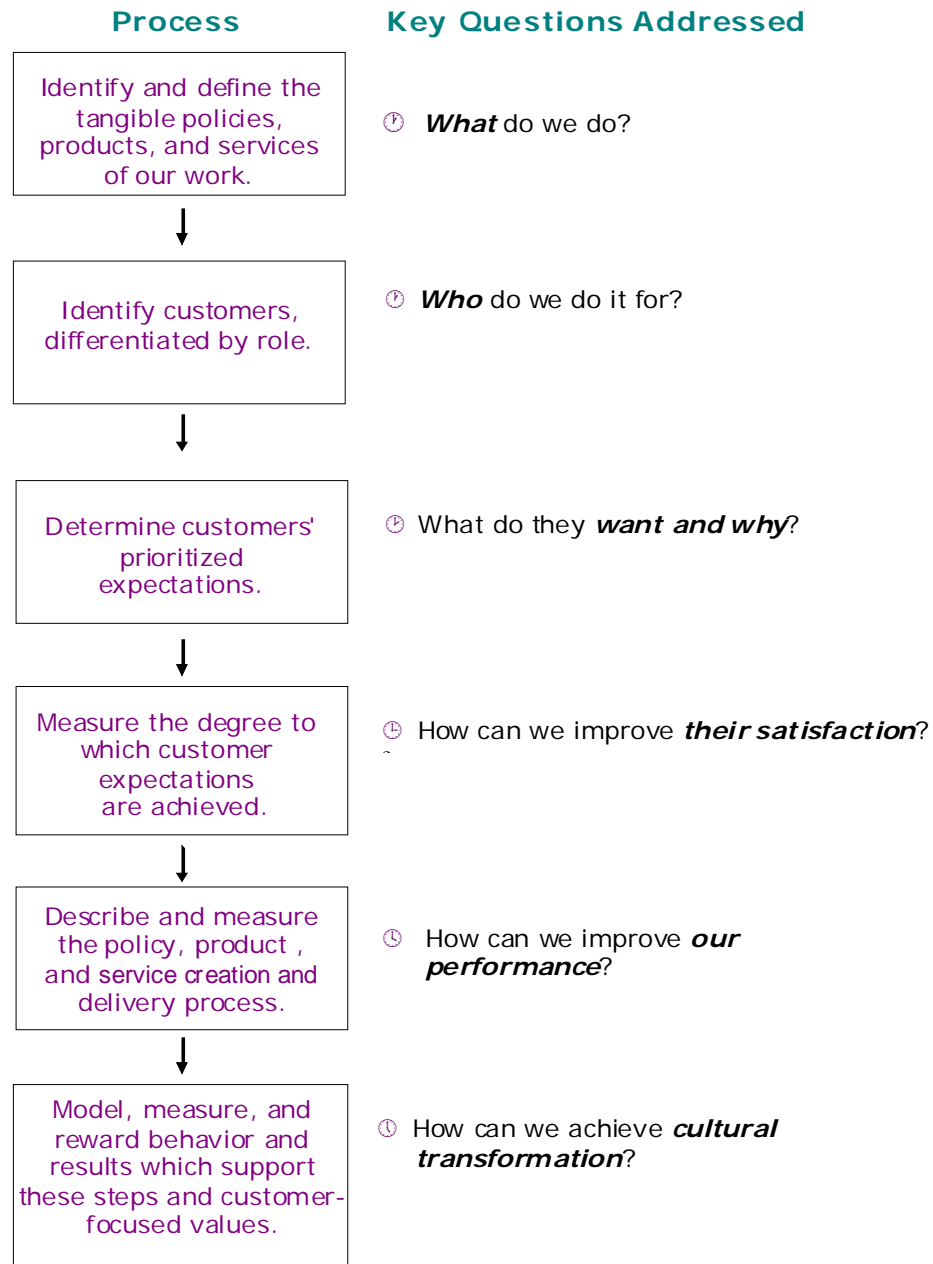
Our methodology differentiates the customer roles in relation to an organization's products and services. This enables an organization to identify and formulate strategies that validate or improve the processes by which policies are formulated, how products are designed to meet customer expectations, and how services are provided to their customer. Moreover, an organization may discover that it needs to change its policies or the design of its products and services to better serve the needs of their customers.

Meta Informatix's **Product Design & Customer Service Assessment** is an effective means to assist **government, health care organizations, pharmaceutical and bioscience companies, financial institutions, and other business enterprises** identify, define and position products that meet customer needs and expectations and improve customer service. Moreover, it provides the essential information needed to help agencies identify and define performance outcomes of the organization.



Our **Product Design & Customer Service Assessment Consulting Service** begins by identifying the "right" customers for your organization and defining the roles that play. This is accomplished by developing answers to five key questions to understand the specific outcomes desired by your customers. The sequence we use to address these questions in our methodology is referred to as **Creating Customer-Oriented Thinking™**.

Creating Customer-Oriented Thinking™



Fundamental Steps to Creating Customer-Oriented Thinking™

The fundamental steps of our methodology are as follows.

1. Identify the “right” customers and define their roles (i.e., broker, fixer, end-user).
2. Develop the “right” questions
3. Conduct interest group meetings with the organization’s staff and representative members of the customer base.
4. Design a probability sample.
5. Design the survey instrument and obtain final approval.
6. Pilot or pretest survey questions to ensure respondent confidentiality with the methods and tools that are used.
7. Review and adjust the customer survey plan based on the findings of the pilot test.
8. Develop a plan for administering the surveys.
9. Define evaluation criteria to validate survey instruments.
10. Develop a project management plan for processing survey data electronically.
11. Administer the surveys and ensure respondent confidentiality with the methods and tools that are used.
12. Analyze findings and draft a summary report for review of organization’s customer service compared to industry standards.
13. Discuss the report’s findings based on survey results, set standards and performances measures, and identify strategies to for attaining them.
14. Identify the implications of the survey results and proposed strategies and revise the organizations strategic plan (as necessary) linking its outcomes, mission, general goals and objectives, etc. to the preferences and expected outcomes of the customer.
15. Implement **Outcome Direction Business Intelligence (BI) Centers** to visually monitor and track the organization’s progress in reaching or surpassing the performance goals and customer service standards defined in the Customer Service Survey Plan and using data that are collected and analyzed from ongoing periodic customer service surveys. **Outcome Direction BI Centers** display reports, charts and analysis generated from BI applications using data sourced from an organization’s data warehouse and/or subject area data marts.

About Meta Informatix, L.L.C.

Meta Informatix, L.L.C. is a high technology consulting firm based in Annapolis, MD. The company has worked with *government, health care organizations, pharmaceutical and bioscience companies, financial institutions, and other business enterprises* to help them develop solutions that transform their data assets into knowledge, enabling them to develop new insights and discoveries that lead to innovation and action.

Meta Informatix helps organizations transform their data assets into knowledge about their customers, markets they serve, competitors, key facts, information about products and services, collaborative and independent research data and information, and the skills and experience of its people.

Using proven methods and advanced technologies, Meta Informatix works closely with its customers to identify and develop “end-to-end” solutions that enable them to access and share their knowledgebase throughout the enterprise to answer strategic and tactical business questions vital to their success.

Commitment to Our Customers

Our commitment to implementing sound consulting practices, developing technology-based products, and delivering quality education and training services enables us to provide our customers with the highest level of service and expertise in areas that we are qualified to offer.

Key provisions of our *code of conduct* are to:

- Safeguard confidential information;
- Render impartial, independent advice;
- Accept only those client engagements we are qualified to perform;
- Agree with the client in advance on the basis for professional charges; and,
- Develop realistic and practical solutions to client problems.

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