

## 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:

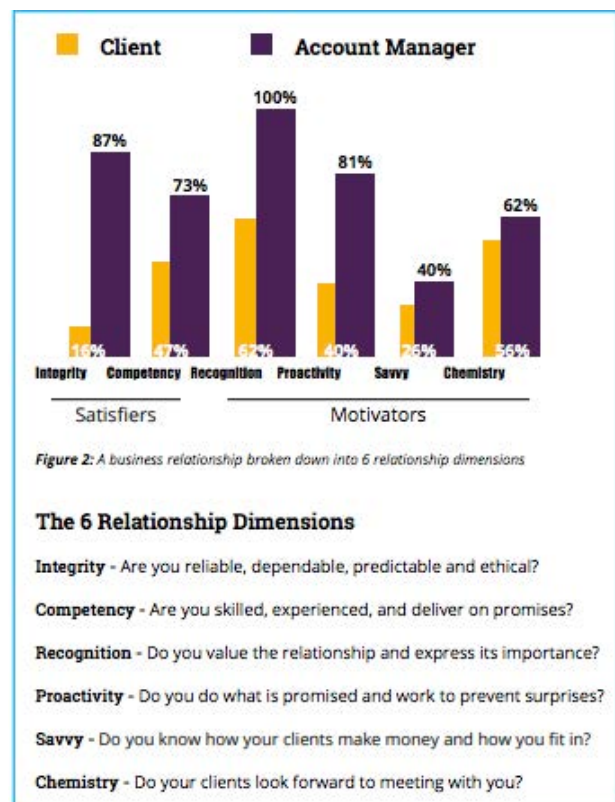


From there, account managers and clients answered a series of questions designed to measure the strength of their business relationships across 6 relationship dimensions.

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](http://encompass-cx.com) / 844-254-4604 / [info@encompass-cx.com](mailto:info@encompass-cx.com)



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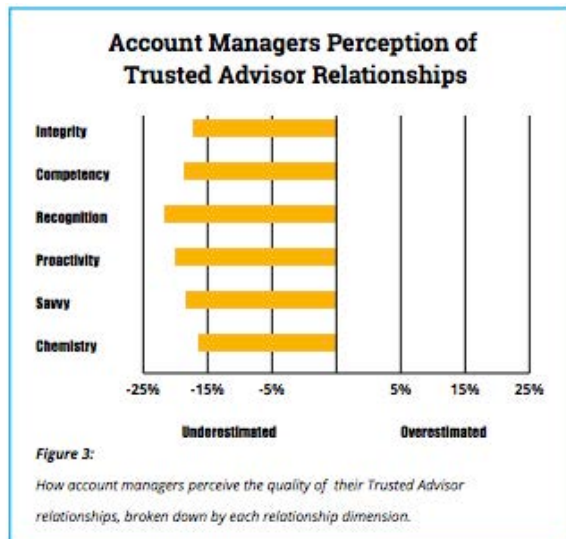
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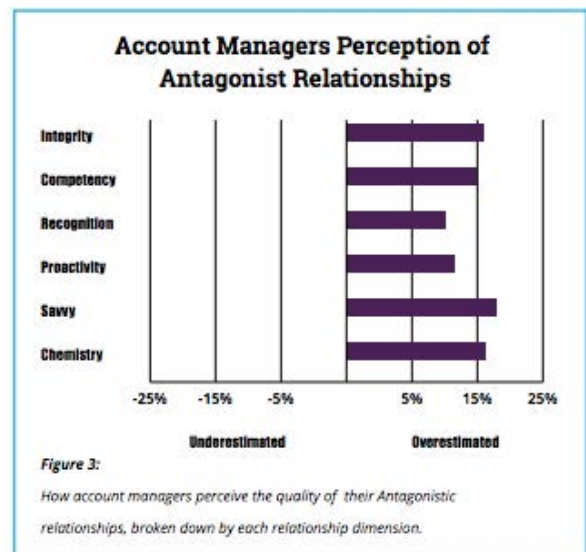
#### What We Found

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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