



Best Practices Program Overview

Foundation, Growth & Enrichment

To make the most of your Allegiance investment, make sure your organization has professional knowledge and advice to complement your software. These rich programs are supported by an experienced staff of seasoned loyalty experts. For clients with extraordinary needs, we have credentialed Ph.D researchers available to facilitate solutions and recommend first steps, next steps, and processes to accelerate your business growth.

Foundation

To ensure everyone in your organization fully understands engagement and the benefits it can give, Allegiance provides educational foundation consulting. You can select an area of focus in which management and other staff members can establish a solid vocabulary and groundwork of knowledge.

Professional Discovery

90 days

Starting with interviews of top management and reviews of current engagement efforts, policies and programs, our experts will ascertain the intent of your current efforts. Then, our experts will use Pulse technology aimed at both customers and employees to measure quantitative impacts of specific drivers of engagement. Using their knowledge, skills, and years of experience, our loyalty experts will assess your current engagement programs and make recommendations for specific plans of action, adjustments, or new programs to make your business better.

Engagement Boot Camp / Problem Resolution Best Practices

1 business day

The myriad of metrics, factors, causes, and effects of customer satisfaction and loyalty can be bewildering to some. This one-day workshop creates a solid foundation for your organization to rationally think about, clearly talk about, and effectively act upon engagement data. The boot camp includes an in-depth review of effective processes for problem resolution; engagement drivers, tactics, indices and what to do about them; case studies of how these ideas have been used to drive corporate policy; and, tips for to help decision makers weigh the costs and benefits.

Survey Design and Data Interpretation Best Practices

1 business day

Today's fast-paced, high-demand thirst for timely and accurate information has led to a flurry of survey activity. Often the individuals executing survey projects don't have an accurate understanding of the research process as a whole. This learning opportunity leads professionals to an in-depth understanding of the survey research process. Participants leave with clear ideas about how to construct research using a survey instrument from conception to final presentation.

Growth

Once you have a core understanding of engagement principals, you're better equipped to put Allegiance products to work. The Growth category of Allegiance Best Practice services helps you grow your business by learning how to use each feature to your own company's advantage.

Key Process Optimization

10 business days

Over time, the efficacy of Voice awareness programs, Pulse survey campaign strategies, or Allegiance software expertise could be sub-optimal. By aligning your current practices with Allegiance best practices we can maximize your ability to gather detailed, specific and precise insight from the Allegiance Suite of products.



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Employee/Customer Turnover Risk Assessment

10 business days

High turnover problems create expensive, risky problems for businesses. Through a combination of statistical analysis, qualitative data interpretation, and experience, Allegiance experts analyze your turnover risk factors. Populations and targeted demographics of either employees or customers inform solutions for minimizing turnover risk. Expert analysts make specific recommendations for next steps to reduce turnover risk.

Engagement Quick Wins

5 business days

Working from the top-down, Allegiance Engagement experts will use your data to systematically identify the unique drivers of Engagement within your organization. Insights may arise from different levels of analysis in the software. We interpret and contextualize the results. Our Engagement experts will work closely with you to read and understand your data, and create areas of improvement, including strategies and tactics to maximize the use of your Allegiance solution. With their help, you can link employee and customer engagement to your important business goals and grow your business faster.

Driving Business Outcomes with Engagement

3 business days

Support your organizational intelligence by giving your team the capacity to conduct in-depth analysis of Allegiance data. Our experts will train your personnel in the art and science of driving profitability through engagement. By using your own data, coupled with case studies, other examples, workshops and walkthroughs, we can turn Allegiance beginners into seasoned engagement experts.

Maximizing the Executive Dashboard

1 business day

Empower your executive team with custom dashboards that align their organizational priorities with Allegiance data. Senior managers need this one-time training to lay the foundation for interpreting high-level data as well as trends, benchmarks, points-in-time, and correlation of Engagement indices with key business outcomes.

Enrichment

Engagement is not a one-time practice; it's ongoing and sustained by management. Learn how to expand your capacity for managing feedback over long periods of time-and in doing so, find the greatest value by identifying trends, successes, and other results through advanced analytics.

National Benchmarking Review

Continuous/1 hour per quarter

Comparing your organization's customer engagement against a nation-wide benchmark has never been easier. Through continuous pulsing of a randomly-sampled, nation-wide audience, Allegiance constructs engagement metrics of Americas customers. Through the benchmarking upgrade, you can understand your organizational strengths and weaknesses against local, regional, and national competition. Included is an annual review of benchmarking data, engagement trends, and expert insights. Think of this package as an outside-the-box analytical perspective for your organization.

Customer Astonishment - Employee / Leadership Workshop

1 or more business days

Darby Checketts has positively astonished clients from businesses such as Duke Energy, Intel and even the federal government. In today's business environment, a satisfied customer is no longer enough. We have all entered a new age wherein we must positively astonish our customers by anticipating their needs. It is essential to build on solid customer relationships, to listen continuously to recognize changing needs, and to earn the right to offer the very best solutions. Your customers expect leadership. Darby's workshops are geared to benefit organizational leaders, back-office and front-line employees.

Cultural Assessment and Alignment Workshop

30 days

Does your company need to change its culture and vision? Through an extensive survey of employees from top executives to mid-managers and below, Allegiance investigates cultural issues within your organization. Allegiance identifies factors of passion and stress as well as high/low productivity and high/low quality employees. Our systematic analysis empowers your leaders with information. Discover what motivates the love group, influences the swing group, and upsets the hate groups of your employees. The culmination of the leadership workshop is a path forward with two or three substantive actions that you can start right away, on Monday morning.

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Qualitative Data Categorization and Classification

Minimum 7 business days

Sometimes large volumes of open-ended data accumulate in the 'other' category. For Voice & Pulse customers we can perform custom coding of open-ended feedback responses to categorize and balance open-ended data. Post-coding will allow you to display the important aspects of qualitative feedback in charts and graphs.

Quick Hit Survey – 5 Pack

7 business days

For customers who lack the internal expertise or resources to execute the design, programming and execution of a 10-question survey, Allegiance provides a rapid, full-service survey implementation. The process begins with a needs assessment and research design consultation. Included in the price is a professional review of methodology, question design & flow, and sampling strategy. Complete data will be made available in an Excel spreadsheet upon completion of each Quick Hit survey. After the survey execution, Allegiance will conduct a thorough analysis, carefully analyze insights, and produce a professional presentation.

Custom Consulting Services

Call for an estimate

Our expertise exceeds the extent of Best Practices packages described in our production documents. If you have a need for specialized analysis or research, chances are our network of experts have already done something like it. Contact us right away to determine how our knowledge can become your asset.

MEET A FEW OF OUR BEST PRACTICES TEAM MEMBERS



Gary Rhoads, Ph.D.

Allegiance Loyalty Expert

Dr. Rhoads works closely with product development teams to convert leading loyalty and engagement principles into product offerings. He consults with Allegiance clients to help them set the right goals, interpret their data and optimize their opportunities.

Dr. Rhoads founded Allegiance Technologies in 2000 to provide companies with Web-based tools to track, monitor, tabulate and manage customer and employee feedback on a real-time basis. SilentWhistle purchased Allegiance Technologies in 2004 and was renamed Allegiance, Inc. Rhoads is currently a professor of marketing at Brigham Young University and holds the Stephen Mack Covey Professorship awarded by the Center of Entrepreneurship. As an active researcher in entrepreneurial marketing strategy, Dr. Rhoads' work focuses on identifying marketing tactics that lead to start-up success.

Dr. Rhoads has published articles in the Journal of Marketing Research, Journal of Marketing, Journal of Market Research Society, Journal of Personal Selling and Sales Management, Journal of Retailing, Behavioral Research in Accounting, Marketing Science Institute, and various AMA Proceedings and serves on the board of advisors of the Center of Economic Development and Opportunity to help develop successful start-up companies in Utah county. Dr. Rhoads received his B.S. degree in zoology with minor emphasis in chemistry and M.B.A. from Idaho State University, and holds a Ph.D. in marketing from Texas Tech University.



David B. Whitlark, Ph.D.

Allegiance Loyalty Expert

Dr. Whitlark has published over thirty academic articles and book chapters about sales forecasting, marketing research, and customer value. He is a former VP/Director of Research at Wirthlin Worldwide, now a subsidiary of Harris Interactive, where he worked with a wide variety of Fortune 500 companies, industry associations, and public service organizations. He has served on the editorial board for Advances in Business and Management Forecasting published by Elsevier Science for the past ten years.

Professor Whitlark earned a Doctorate degree from the Darden School, University of Virginia, and holds a Master of Business Administration degree from the S.C. Johnson School, Cornell University. While working at the DuPont Company as a Doctoral Fellow, he attended post-doctoral courses in research methods and multivariate analysis at the Wharton School, University of Pennsylvania.

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Kyle LaMalfa

Allegiance Best Practices Manager & Loyalty Expert

Kyle LaMalfa helps Allegiance clients fine tune and optimize their customer, employee, and feedback engagement processes to align closely with idealized standards.

LaMalfa has been analyzing data professionally since 1996. Along with undergraduate degrees in mathematics and economics, LaMalfa will complete a master's degree in statistics in 2007. His professional experience includes time as a software quality engineer for a large financial services company, a data warehouse engineer at a mountain resort, a freelance consultant for local businesses, and the lead statistician for a market research company. Throughout his career, LaMalfa has worked with managers and executives to answer business questions using statistical data and research. Problem solving specialties include customer/employee attrition, customer/employee engagement, data mining and predictive modeling.

For pricing, contact Allegiance Sales: 1-801-617-8000
or sales@allegiance.com

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