



# ON-HOLD MESSAGING USER SATISFACTION RESEARCH



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# What we will talk about...

1. Research Methodology
2. Key Findings
3. Detailed Findings
  - Client Satisfaction
  - Reasons for Purchasing On-Hold Messaging
  - Impact of On-Hold Messaging
  - Opportunities
4. Recommendations
5. And Finally....

1.

# Research Methodology



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# Research Methodology

- Online survey open from March 26th to April 15<sup>th</sup>, 2012
- Survey sent out to 60 members of On-Hold Messaging and Audio Messaging Association (Europe), who were asked to distribute the survey to their own clients
- Incentives:
  - iPad 3 and two iPod Touches to randomly selected respondents.
  - iPad 3 to the member company who had the iPad-winning respondent.
- Survey responses were aggregated and analyzed anonymously by Greystoke Insights
- Responses from **1,555 clients of 27 members**
- Note: this survey cannot be taken to be fully representative of all on-hold messaging users

## Learning more about your specific business

- Individual reports can be prepared with data from your specific customer responses
- Please contact me for further details

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# 2.

# Key Findings



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# Key Findings

- OHM users have an extremely high level of satisfaction
  - Generated by service, product quality, professional image
- OHM provides clear marketing benefits vs. phone alternatives
- Opportunity to add real \$ to business
- Areas for improvement:
  - Ease of updating messaging and additional support
  - Additional options – music, more varied voices, copywriting, Spanish language, etc.
  - More support on using for greatest effectiveness, business guidance



# 3.

# Detailed Findings



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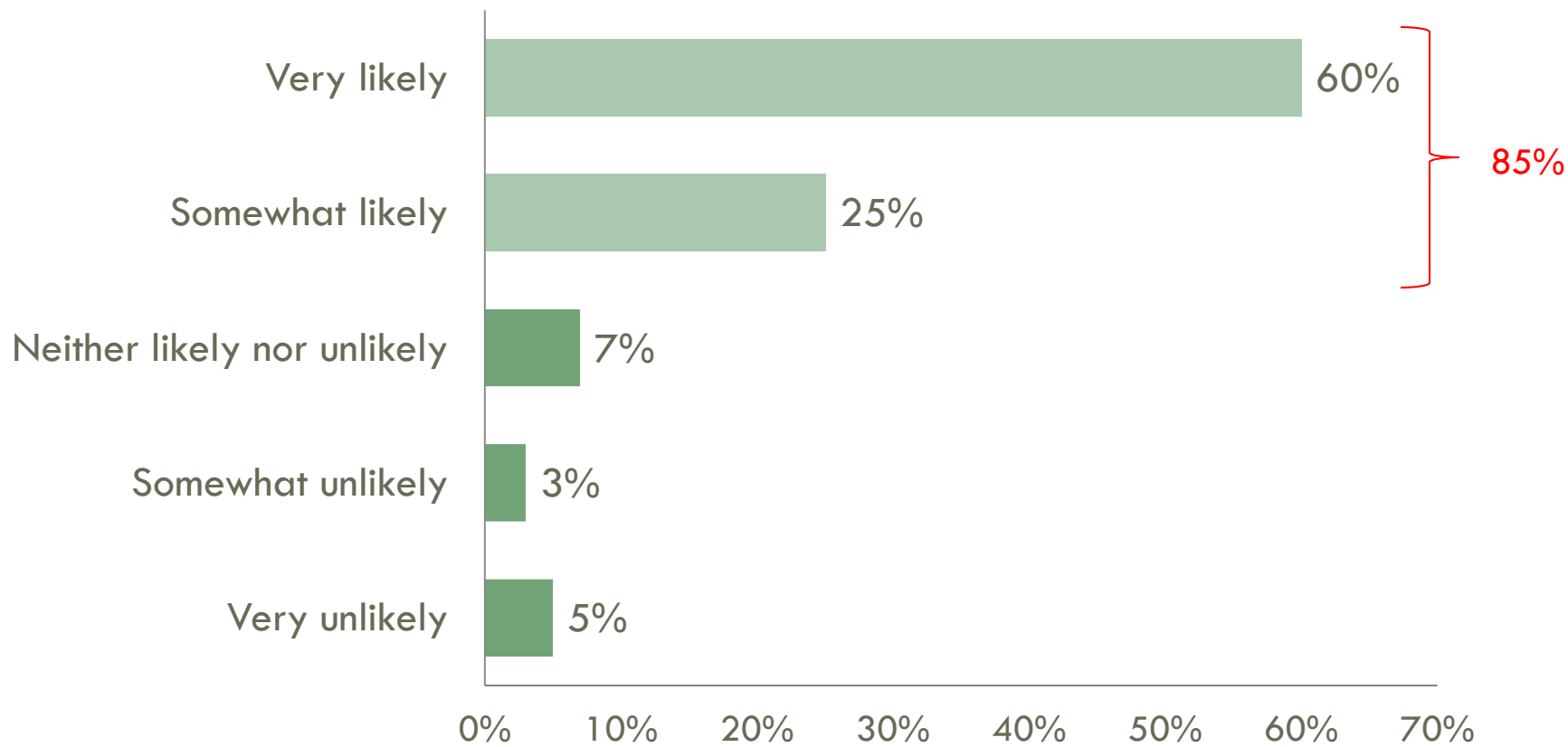
# Client Satisfaction



# Satisfaction with On-Hold Messaging is extremely high

## 85% of respondents would recommend it to others

Likelihood to Recommend On-Hold Messaging



Qn 23: How likely or not would you be to recommend On Hold messaging to other companies? N=1,474

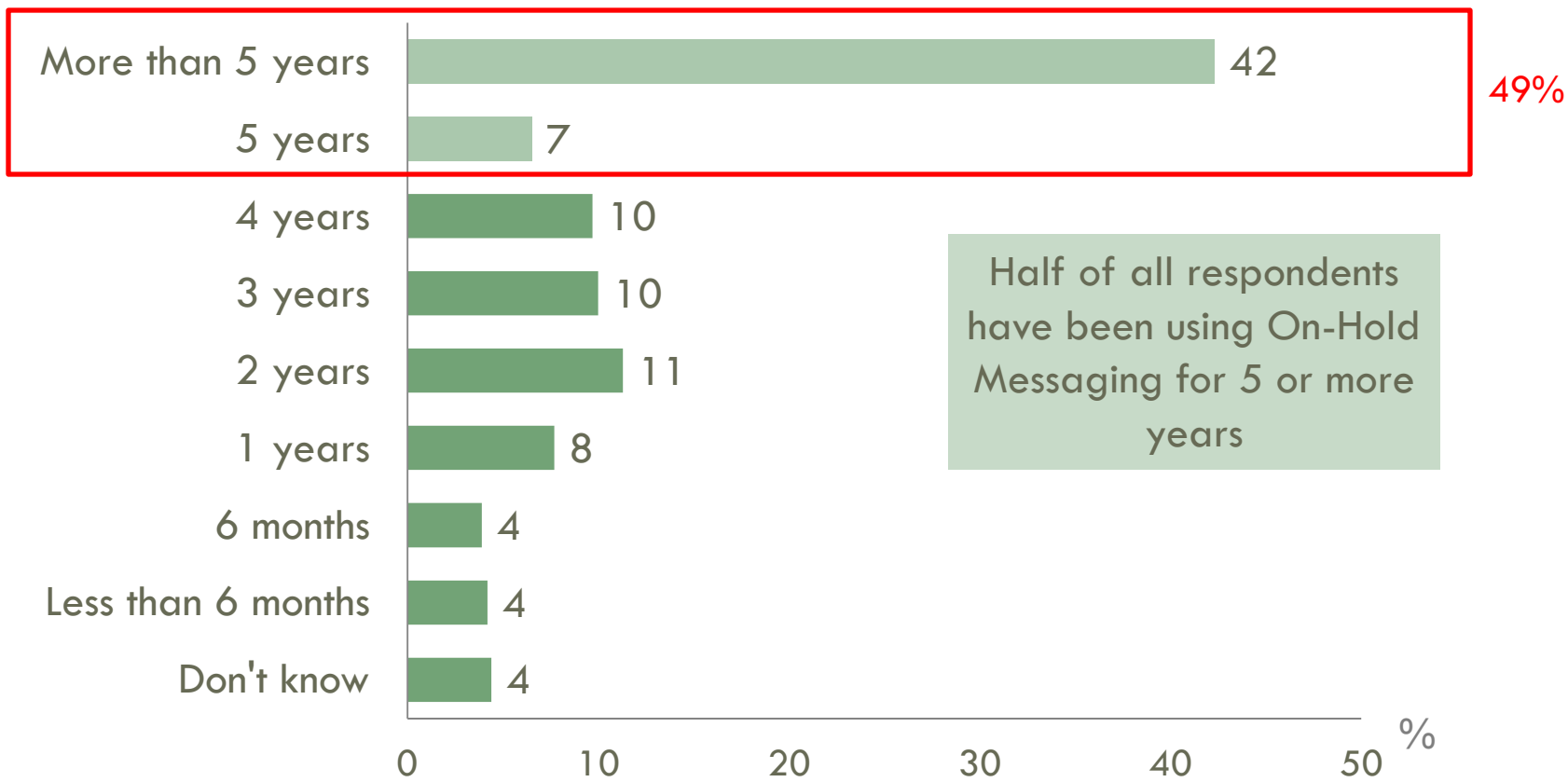


# Users resoundingly believe in the value that on-hold messaging adds

It's a useful marketing tool that adds value	85%
It's nice to have, but it's not that important	12%
It's a necessary evil	3%

Qn 13: From a pure marketing perspective, which of these statements best describes how you feel about the role of your On Hold messaging program in your overall marketing mix? N=1,380

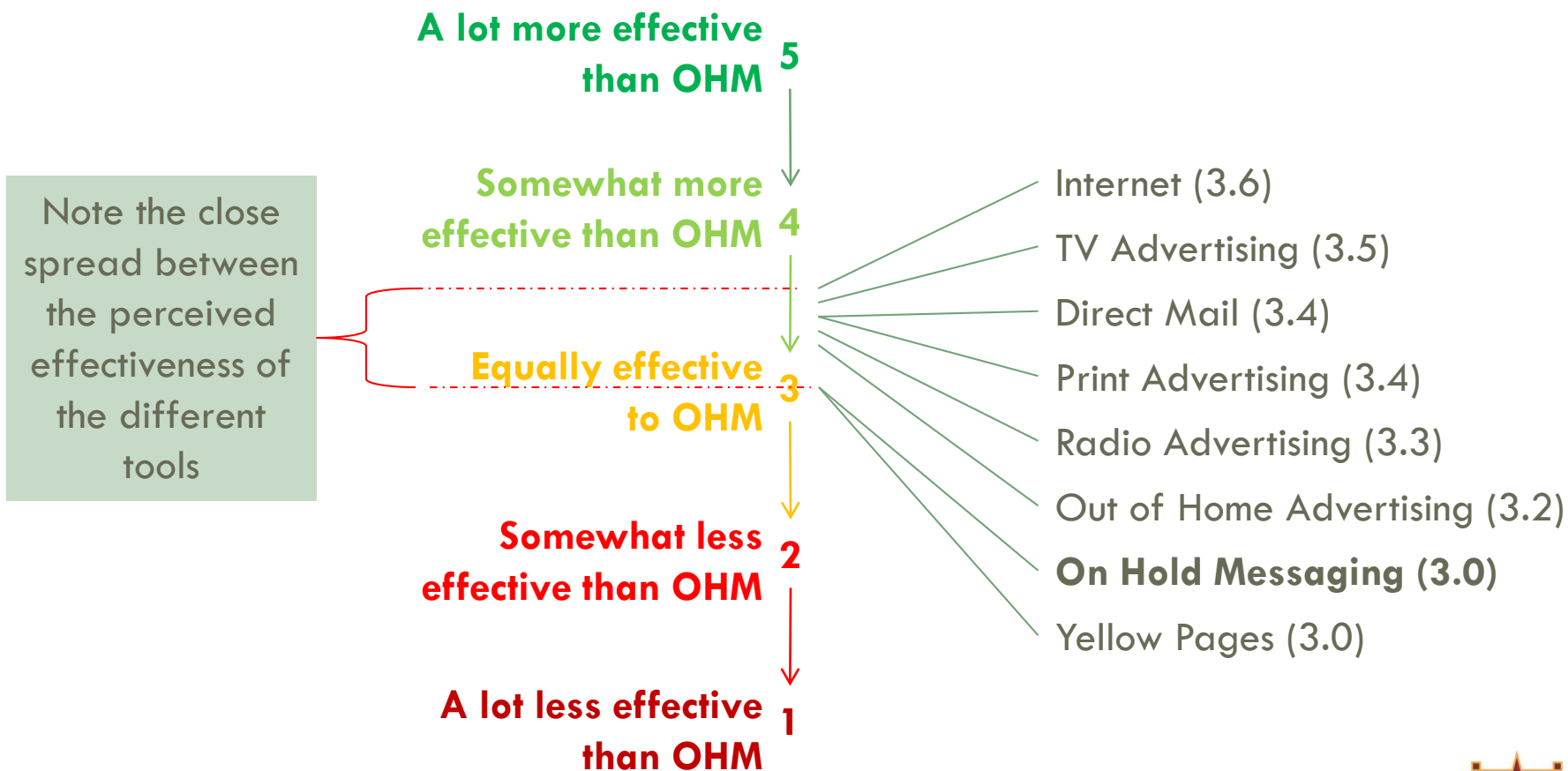
# All of which leads to a high rate of client retention



Qn 1: How long have you been using On-Hold messaging at your business? N=1,554

# OHM's effectiveness in growing business is regarded as close to other marketing tools

## Perceived Effectiveness of On-Hold Messaging vs. Other Tools in Growing Business



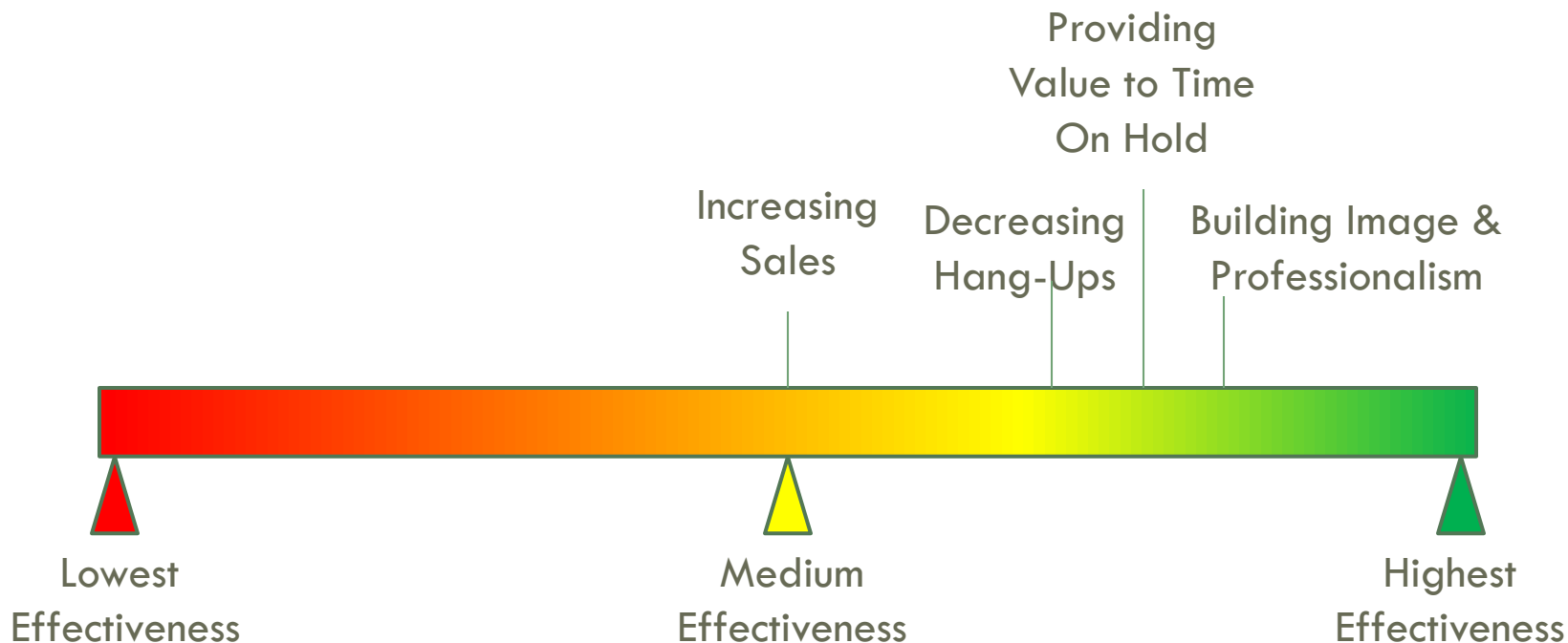
Qn 15: How would you rate the effectiveness of your On Hold messaging in growing your business, compared to other forms of marketing you use? Please select a number from 1 to 5 for each row, where 1 is the lowest score and 5 is the highest. N=1,362

Source: Online survey to OHMA and AMA (Europe) clients, April 2012



# On-Hold Messaging delivers perceived value to both those on hold and the company using it

## Perceived Effectiveness of On-Hold Messaging



Qn 16: In your opinion, what effect, if any, has your On Hold messaging had in the following areas? Please select a number for each row between 1 and 5, where 1 is the lowest score and 5 is the highest. N=1,471

Source: Online survey to OHMA and AMA (Europe) clients, April 2012



Respondents also recognize that On-Hold Messaging has to be just one part of the marketing mix

“I feel it is a useful tool but **only if it ties in with the other marketing** your company is already doing.”

“It's a good tool once you've had the client contact. However the most important marketing area is getting people to contact you first. **Without the initial contact they will never hear the on hold messaging.**”

Qn 24: Why? [would you recommend/not recommend on-hold messaging to other companies] Bottom 2 box respondents from Qn 23:  
How likely or not would you be to recommend On Hold messaging to other companies? N=9

Some of the benefits from using On-Hold Messaging  
– in the customers’ own words...

“Reduces [callers’] stress and anxiety”

“More professional than just music- we are in sales after all”

“It is very important so the customers know that they are still on hold and haven’t been forgotten about”

“It is the first contact the caller has with the organization”

“Not having an on hold message is the equivalent of not having a company website!”

Open –end responses from Qn 13: From a pure marketing perspective, which of these statements best describes how you feel about the role of your On Hold messaging program in your overall marketing mix?.







They acknowledge the quality of both the product and the service:

“The simplicity of the On Hold software & their excellent customer service to clients”

“Very happy with the customer service and the quality of the product”

“Support is outstanding. The recorded messages are high quality.”

“Easy to use and install ”

“Great service and great people to work with ”

Qn 24: Why? [would you recommend/not recommend on-hold messaging to other companies] Top 2 box respondents from Qn 23: How likely or not would you be to recommend On Hold messaging to other companies? N=481

Other reasons for recommending OHM focus on value to the business and to callers:

**“I do think it is a way to get certain messages out there about sales or special events, not to mention other services that you offer that people may not be aware of.”**

**“It's a natural part of the sales cycle, helps us give a non-pressure sales pitch as it entertains customers on hold.”**

**“It is irritating to sit on hold and hear nothing. Music is fine as a distraction, but to learn info on the company you are calling is important”**

**“It is an excellent way to promote products while customers are on hold. We have actually had customers asked to be placed back on hold to finish listening to the message.”**

Qn 24: Why? [would you recommend/not recommend on-hold messaging to other companies] Top 2 box respondents from Qn 23: How likely or not would you be to recommend On Hold messaging to other companies? N=481

However, bad service can quickly turn a customer off

**“Your after-sales service was the worst we've encountered. Your people were rude, ignorant and unprofessional to say the least!!!!”**

**“Our service has not been working properly for months. We have experienced on-going issues and **continue to get no real solutions.**”**

**“The only time we have dealt with on-hold other than initial set-up was a little rough. We had to have our "little black box" replaced to update and then following the Christmas season our on-hold message went back to the original message. **It took more than 15 days to get this issue resolved.**”**

Qn 24: Why? [would you recommend/not recommend on-hold messaging to other companies] Bottom 2 box respondents from Qn 23:  
How likely or not would you be to recommend On Hold messaging to other companies? N=9



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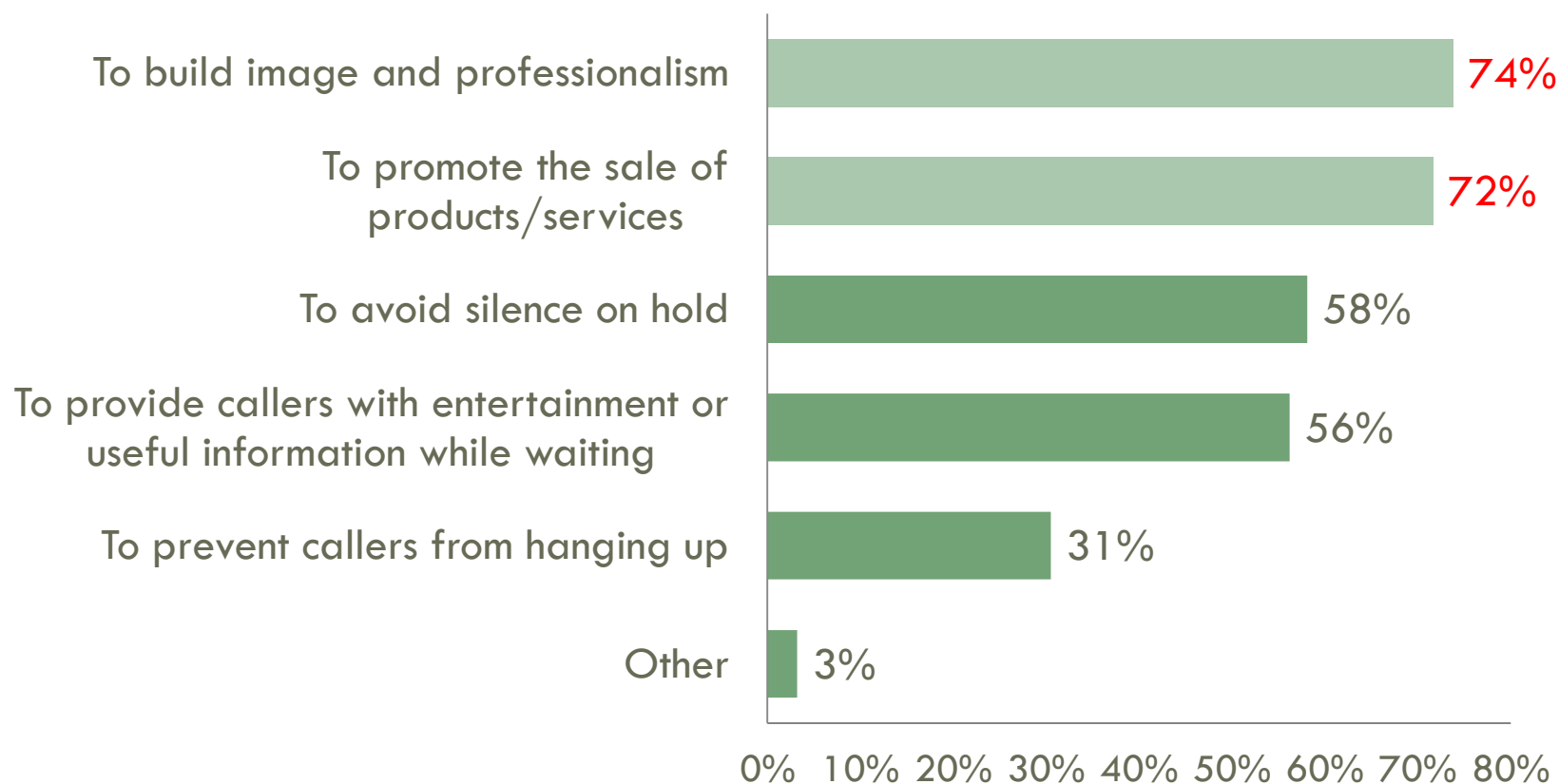
# Reasons for Purchasing OHM



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# Customers chose to purchase OHM for both general image-building and specific marketing reasons

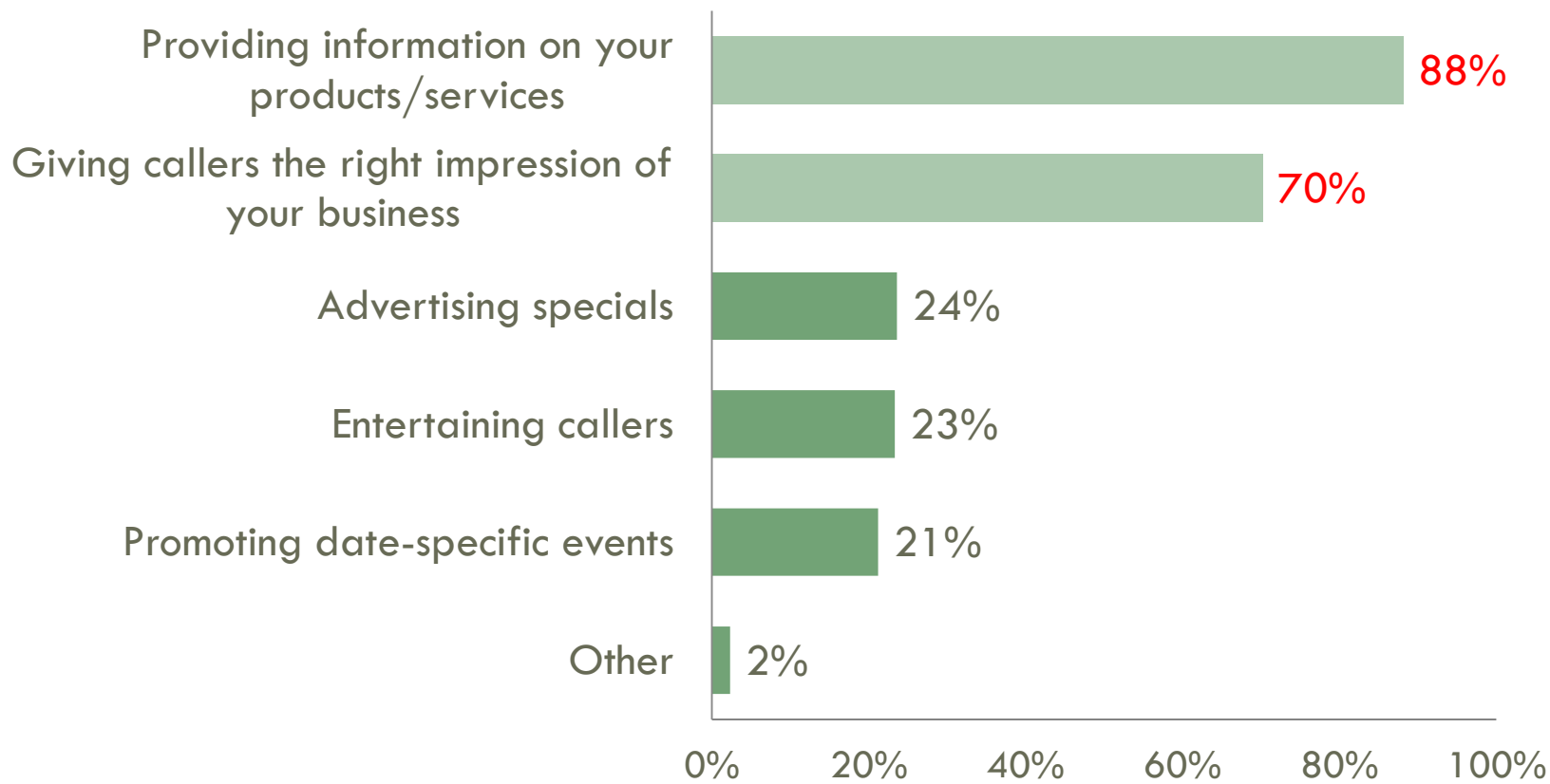
## Reasons for Purchasing On Hold Messaging



Qn 10: Why did your company purchase On Hold messaging? Please select all that apply. N=1,080

# This is reflected in the ways they use it today

## Ways in Which On Hold Messaging is Used



Qn 14: In which of the following ways, if any, do you use your On Hold messaging system? Please select all that apply.. N=1,379



Other reasons for purchase include concerns around using music alone for on-hold customers

“so the caller doesn't have to listen to bad music!”

“poor radio reception in area”

“CD player was inconsistent in sound quality”

“we were playing the radio and that's illegal”

Although sometimes music has its role...

“We use only music, as messages in either Afrikaans to English speakers or vice versa give offence”

Qn 10: Why did your company purchase On Hold messaging? Please select all that apply. N=1,080



3c

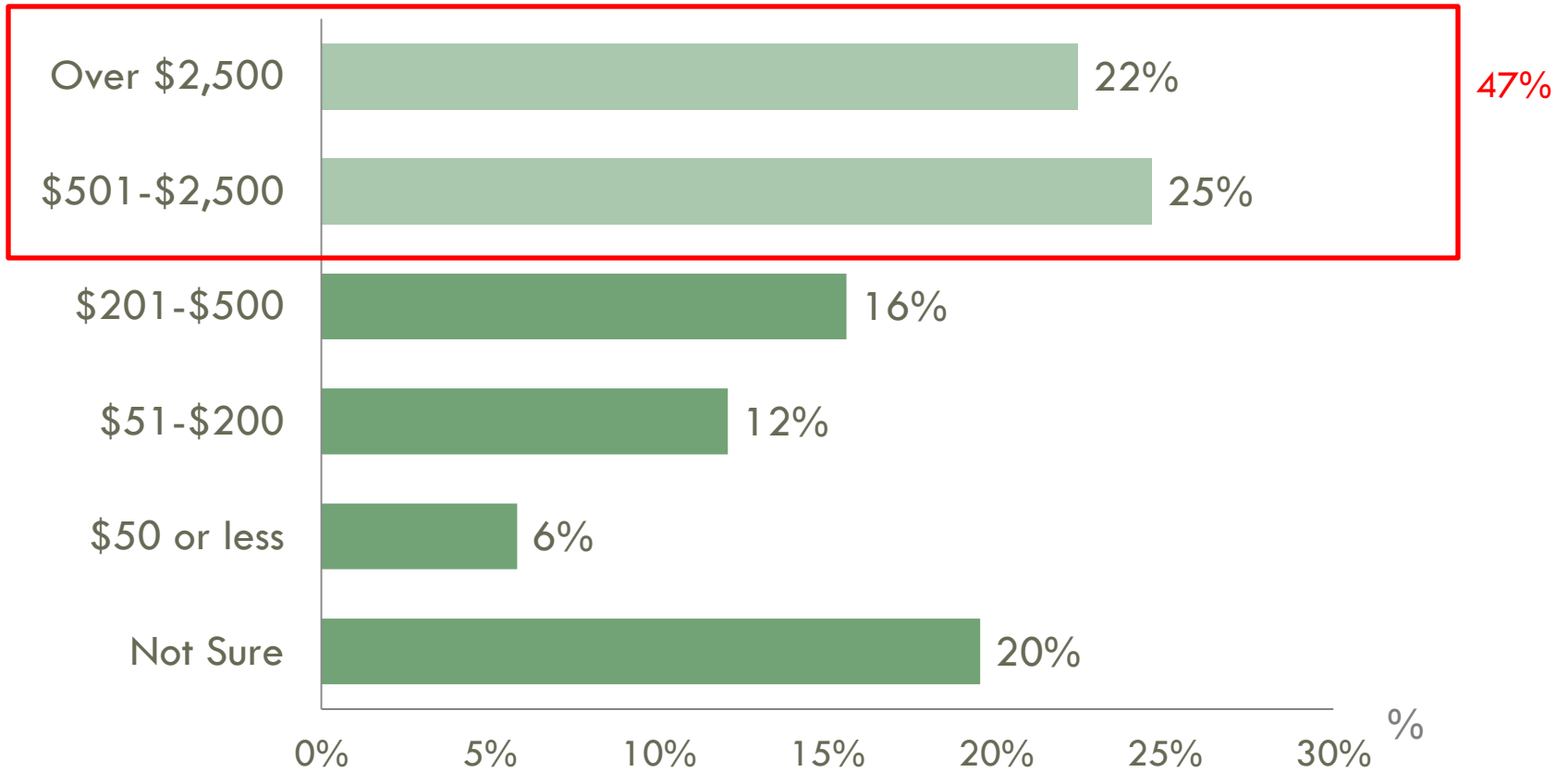
# Impact of OHM



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While OHM is used by businesses with sales at all levels, most respondents sell big-ticket items/services (\$500+)

Avg. Individual Sale

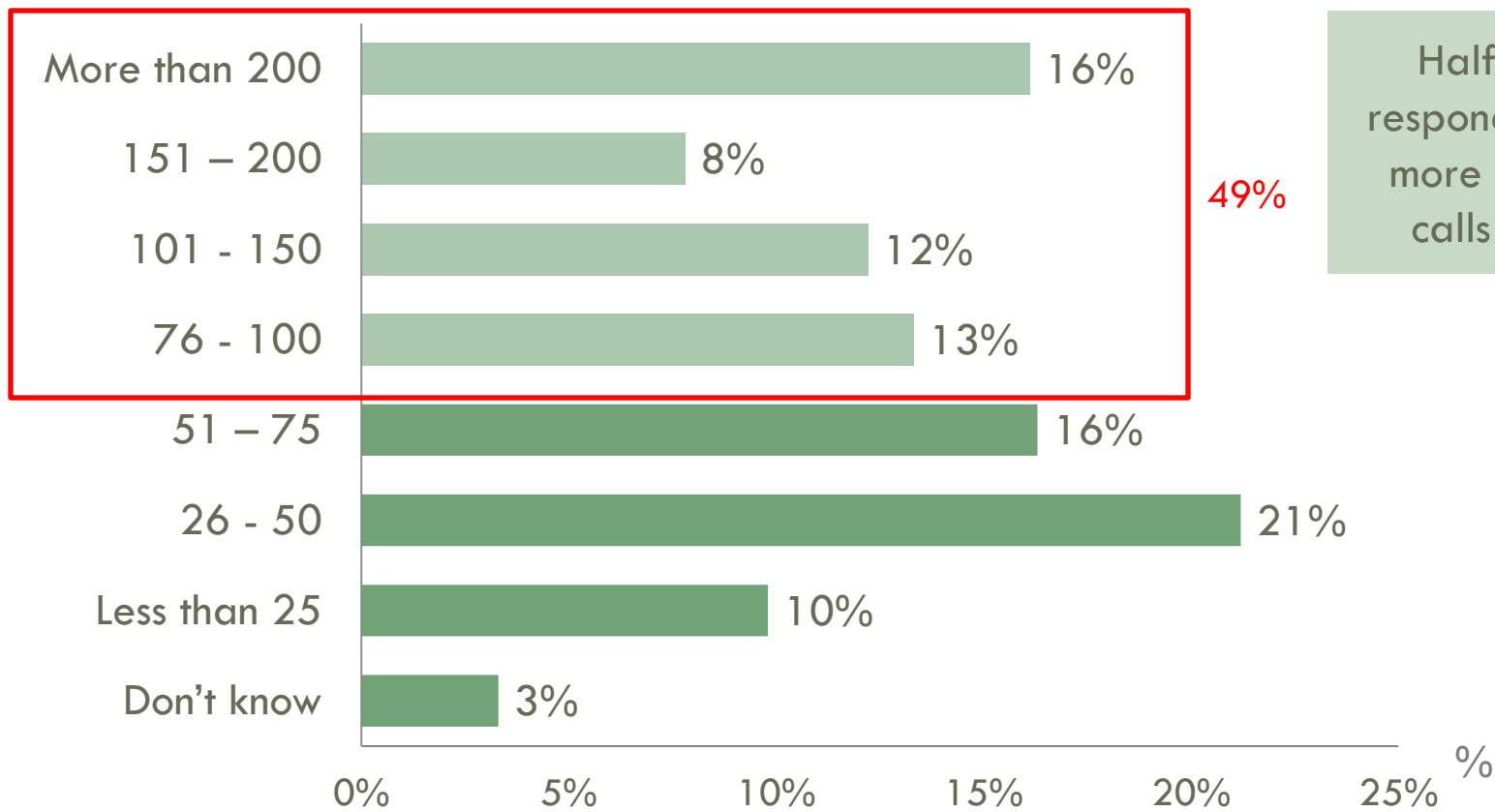


Qn 4: How much is your business' average individual sale? N=1,137



# Call volume is high – half of all respondents manage more than 75 calls daily, and 1 in 6 gets more than 200

## Avg. Daily Calls



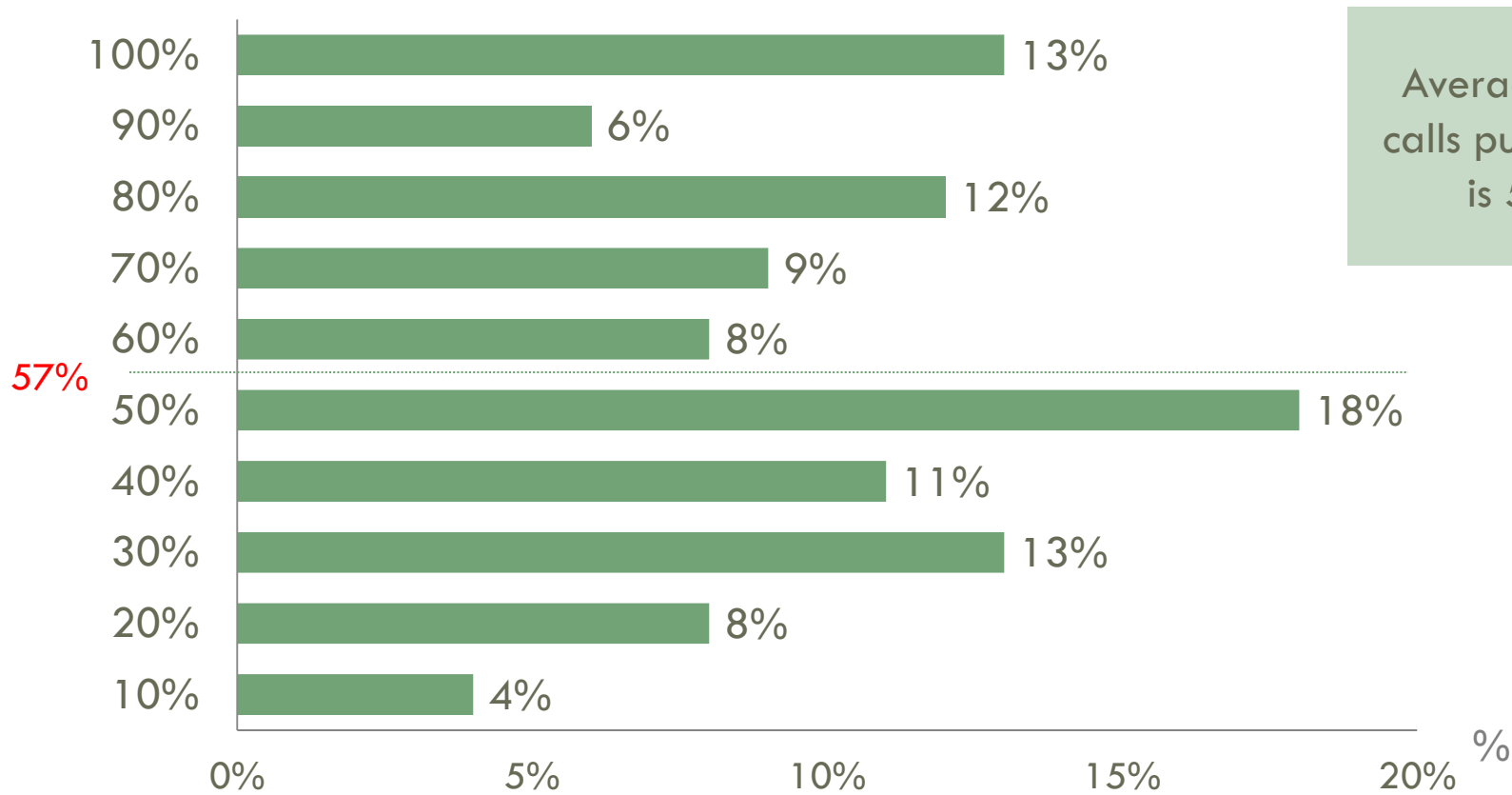
Half of all respondents get more than 75 calls a day

Qn 5: How many calls does your location receive on a typical day? Your best guess is fine. (If your business has more than one location, please answer this question for an "average" location in your business.) N=1,505



# The average number of calls put on hold is somewhat over 50%

% of Calls Put On Hold/Transferred



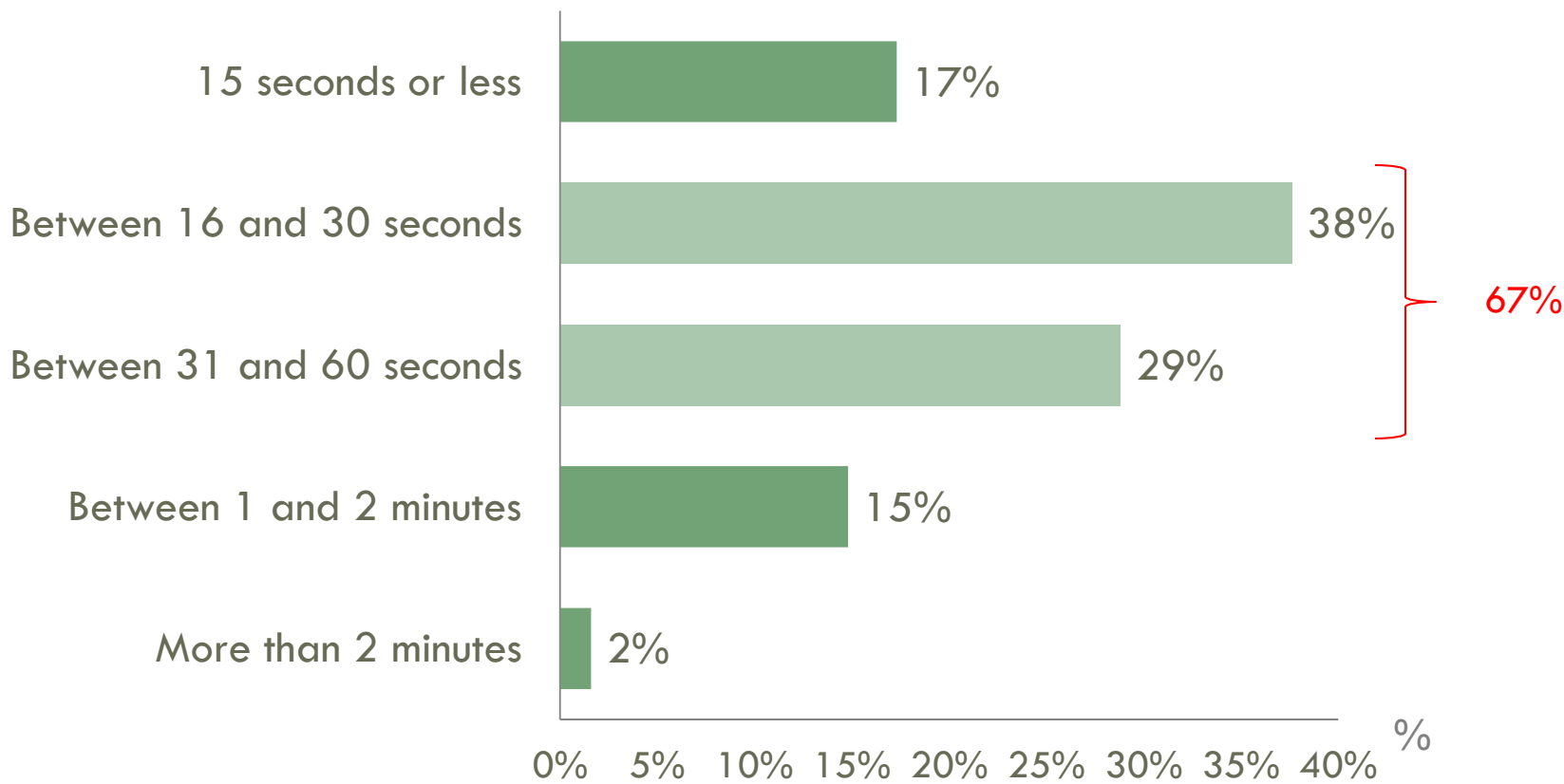
Average % of calls put on hold is 57%

Qn 6: Out of every 10 calls you receive, how many would you estimate are placed on hold or transferred at some point during the call? N=1,511



# Two-thirds of callers are on hold for between 15 seconds and a minute – long enough to hear message, without becoming frustrated by time on hold

Length of Time on Hold

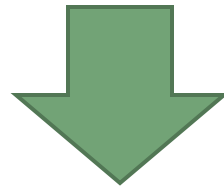


Qn 7: How long would you estimate your callers are typically on hold, either when they first call or when they are being transferred?  
N=1,509



## Typical On-Hold Client

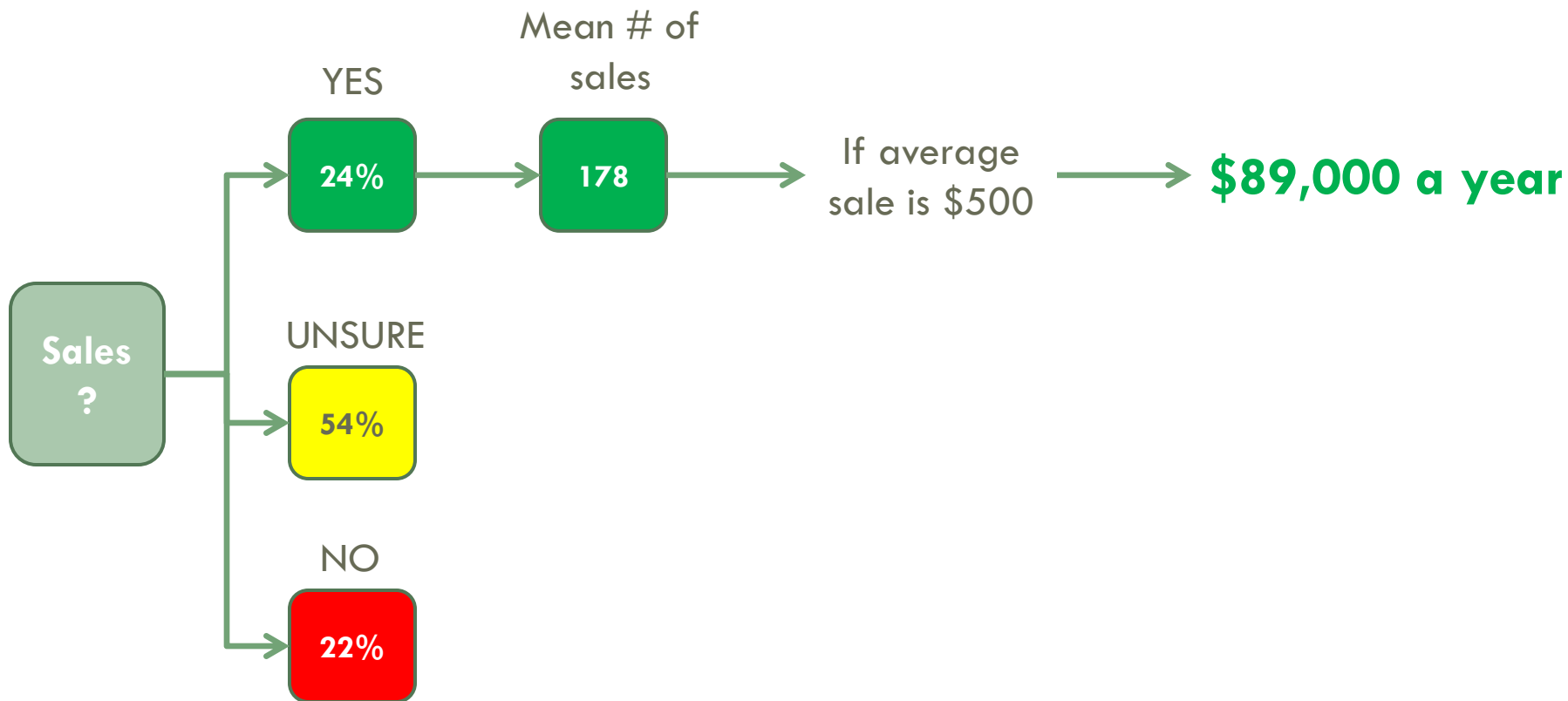
- 100 calls a day....
- 57% on hold ...
- Typical hold time of 30 seconds...



Translates to **half an hour a day, every day**, of messaging to on-hold customers

... or equivalent of **3+ weeks a year** talking directly to your customers

# For at least a quarter of respondents, On-Hold Messaging generated real sales value



Qn 20 To the best of your knowledge, has your On Hold messaging been directly responsible for any sales? N=1,474; Qn 21: In the last year, how many sales do you estimate have been a direct result of a caller learning more about your business while on hold or waiting to be transferred? N= 221

But it's not just about making sales:

“While MOH does not directly affect my sales, at this time, I do appreciate the positive affect it has on customers placed on hold.”



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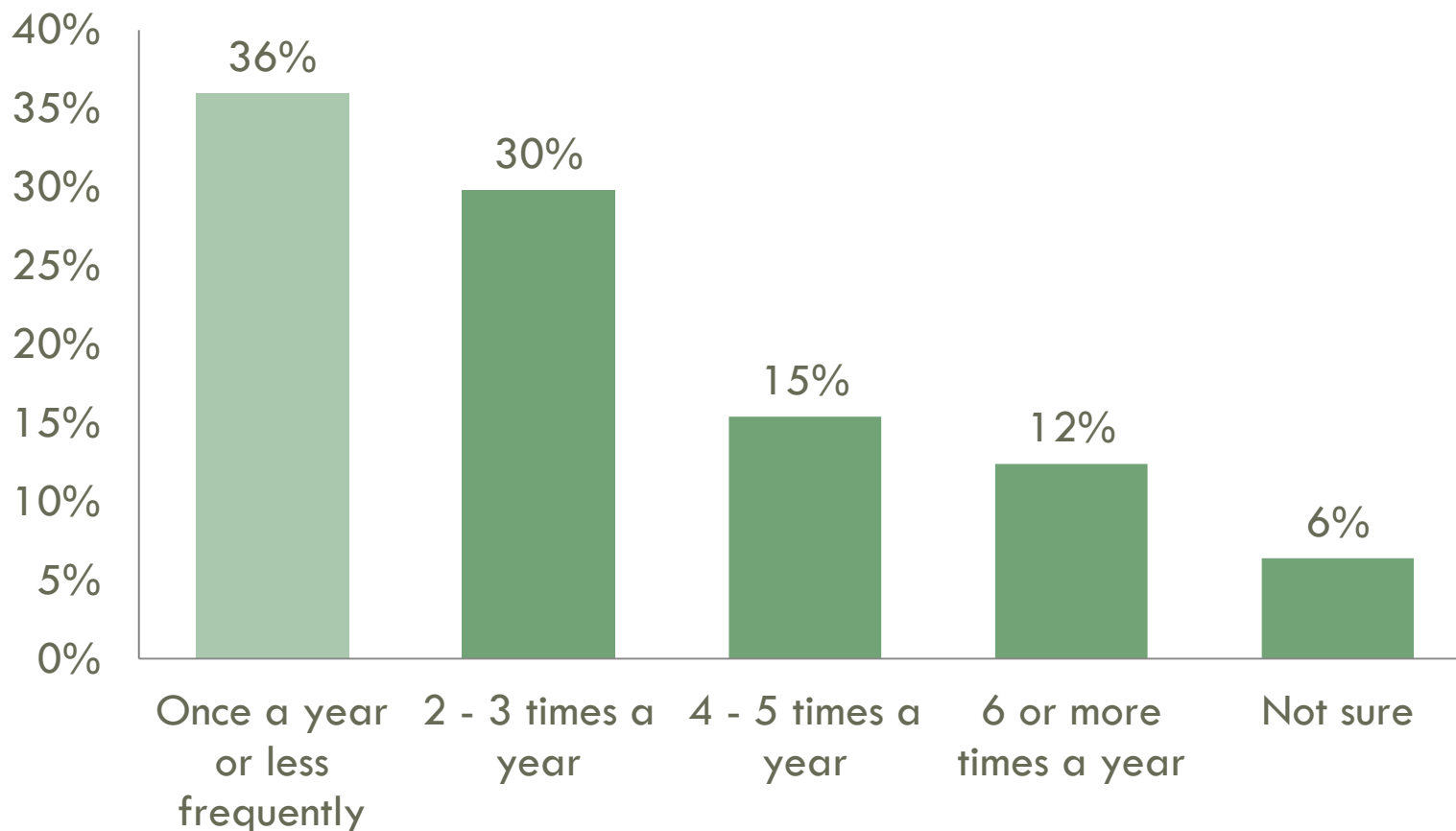
# Opportunities



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# One-third of users are updating their messages annually or less frequently

Frequency of Updating Message



Qn 8: How many times a year, if at all, do you typically update your On Hold messaging?



# There are possible benefits from increasing frequency of message updates

While it is hard to separate cause and effect,

- Respondents who update their message 6+ times a year are statistically more likely to:
  - Have 200+ calls daily
  - Use OHM in a broader variety of ways
  
- They perceive a bigger impact from their use of OHM
  - Describe OHM as a useful marketing tool that adds value
  - Believe that OHM has been directly responsible for sales

Qn 8: How many times a year, if at all, do you typically update your On Hold messaging? Also Qn. 5, Qn. 13, Qn. 14, Qn. 20

A common reason for not updating is that some users struggle with process & would appreciate more help

**“We need more input and help from your side to update and change the messages”**

**“We have a hard time changing info each month”**

**“I think it is a pain to update.....that process never works, you always have to send a new card”**

Qn 24: Why? [would you recommend/not recommend on-hold messaging to other companies] Bottom 2 box respondents from Qn 23:  
How likely or not would you be to recommend On Hold messaging to other companies? N=9

There is also interest from some customers in getting more support to maximize their benefit from OHM

“I don’t feel I use it as well as I could and would need more help from you to do that”

“Challenging to gauge how much value it really adds or ROI. Do you guys have any tools for measuring this?”

Open –end responses from Qn 13: From a pure marketing perspective, which of these statements best describes how you feel about the role of your On Hold messaging program in your overall marketing mix?.

4.

# Recommendations (based on Research findings)



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# Recommendations for working with current customers

- Continue focusing on providing first-rate service to your customers
  
- See yourself as a business partner, rather than just a vendor
  - Share best practices on using OHM
  - Partner with customers & OHMA to collect data on usage and effectiveness
  
- Think about how you can add extra value to your customers  
Some suggestions from the research include:
  - Regular reminders about updating message
  - Suggested scripts
  - Spanish or other language options

# Recommendations for attracting new customers

- Think about how to harness satisfied customers to spread the word
  - Referral incentives?
  - Testimonials?
  - Social networking?
  
- Use this research data to support your sales pitch
  - I am available to answer questions on how to use the data appropriately
  
- Both of the above can be used to help educate prospects as to the benefits of OHM
  - Financial opportunity
  - Enhanced perception of professionalism
  - Improved customer satisfaction



5.

And Finally...



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## Some final comments from On-Hold Messaging users:

“I have been very pleased with On Hold messaging. On a scale of 1-10, with 10 being best, they are a 12!”

“I love it!”

“On Hold ROCKS!”

“Choosing On Hold messaging is one of the best business decisions I have ever made.”

“I wish I had it 15 years ago. NO BUYER’S REMORSE EVER!!”

Qn 25: Why? [would you recommend/not recommend on-hold messaging to other companies] Bottom 2 box respondents from Qn 23:  
How likely or not would you be to recommend On Hold messaging to other companies? N=9

# Congratulations on the individual call-outs!

- **The Austin TX staff**, ACE On Hold
- **Ron Schott**, ACE On Hold
- **Drew**, Thanks for Holding
- **Vincent Edwards**, On Hold Marketing Services
- **Tim Jackson**, On Hold Marketing Services
- **Jerri Owen**, On Hold Marketing Services
- **Renee Rousseau**, On Hold Marketing Services
- **Nicole Yancey**, On Hold Marketing Services
- **Andy H.**, The Production Department
- **Chester Hull**, ProSound
- **Betty Green**, Smart Link Solutions
- **Nikki**, Sound Marketing
- **Frank Magnani**, Sound Marketing Concepts
- **David Thelen**, Sound Results
- **The Durban staff**, Success On Hold

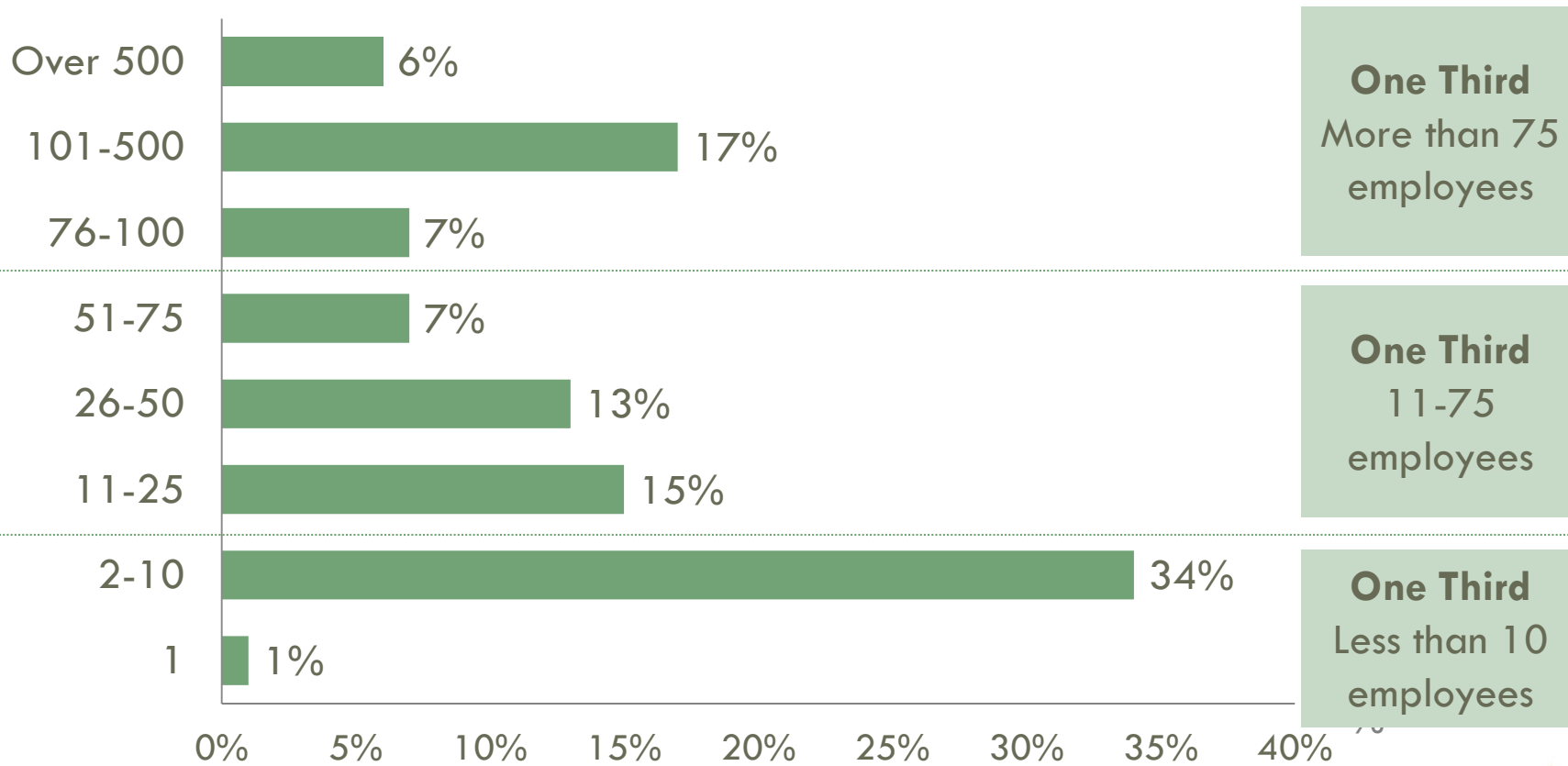
# Appendix - Respondent Details



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# On-Hold Messaging is used by businesses of all sizes...

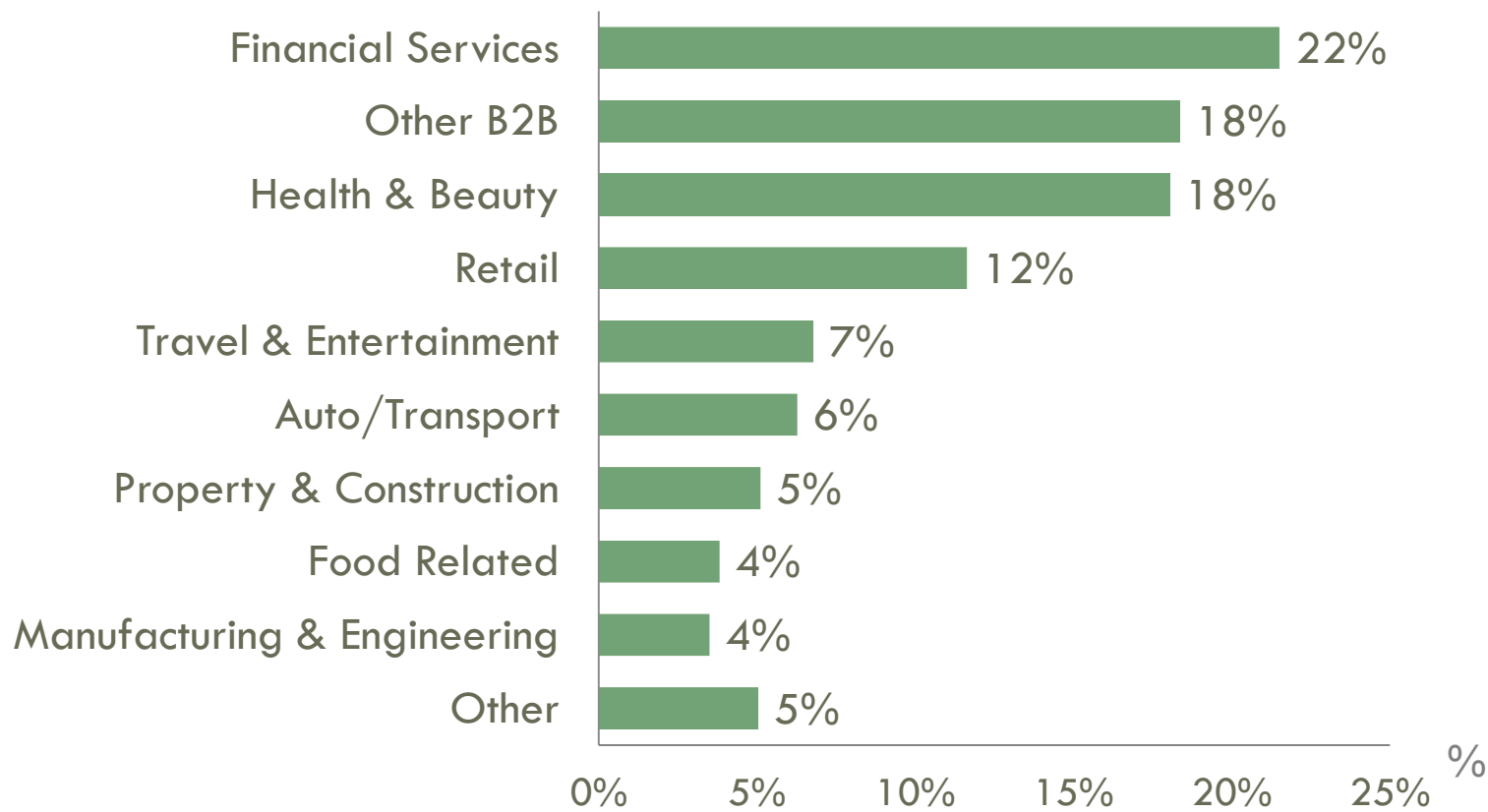
## Number of Employees



Qn 3: How many employees does your business have? N=1,507



# ...and representing a broad range of industries



Qn 2: What is your primary line of business? N=1,548 Majority of "other" responses were recoded.



# About Us



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# Greystoke Insights

Greystoke Insights leverages quantitative and qualitative research techniques to provide insight-driven solutions that help businesses achieve their goals.

Key services include:

- Consumer Insights and Marketing Research consulting
- Workshop planning and facilitation
- General strategy and management consulting

Recent project examples include:

- Quantitative research into behaviors and attitudes of Facebook visitors for leading baby products manufacturer
- Qualitative research to test concept and refine target market for new sports app
- Development and facilitation of cross-functional workshop for senior management of national casual dining chain, focusing on generating creative marketing approaches
- Development and facilitation of workshop for leading beverage company's staff and agency partners, focusing on defining brand strategy for new liquor





# Arabella Pollack



Arabella Pollack founded Greystoke Insights in 2010.

Arabella has extensive experience in applying consumer understanding for effective decision-making. She has worked as a strategy consultant for The Boston Consulting Group, and has also worked for leading research companies Knowledge Networks and The NPD Group. She currently teaches the "In Search of Insights" course for Columbia University's Masters in Strategic Communications program.

Before founding Greystoke Insights, Arabella was Director of Consumer Insights at Pernod Ricard USA. She managed a full spectrum of research for brands such as ABSOLUT vodka, impacting the business in areas ranging from innovation to communication strategy and portfolio management.

Arabella holds an M.A. from Cambridge University in England, and an M.B.A. from the Darden Business School at the University of Virginia.





THANK YOU

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