

Running an Effective  
**Customer Effort Score**  
CES Campaign

**ManagementXP**



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## Customer Effort Score (CES)

**CES** is a key metric that evaluates how easy it is for customers to interact with your brand, resolve issues, or complete actions. By reducing customer effort, businesses can create seamless experiences that encourage retention and foster long-term loyalty.

This guide provides a structured framework for implementing and optimising CES programs, offering practical insights, tools, and real-world examples.

### Benefits of Tracking CES

**Improved Customer Retention:** Customers who find interactions effortless are more likely to stay loyal, reducing churn and increasing lifetime value.

**Increased Customer Satisfaction:** By focusing on ease of interaction, CES highlights areas to enhance overall satisfaction.

**Actionable Feedback:** Directly pinpoints friction points in customer interactions, enabling targeted improvements.

**Operational Efficiency:** Helps identify inefficiencies in processes, such as support workflows or checkout experiences, leading to streamlined operations.

**Better Predictive Insights:** CES is a strong indicator of future loyalty and advocacy, helping forecast customer behaviours.

**Enhanced Competitive Advantage:** Delivering a smoother experience differentiates your brand, making it more appealing compared to competitors.

## How CES Works

CES measures the ease of customer interactions with a single focused question, typically rated on a scale from 1 to 5, or where more granular feedback is required broader scales 1 -7 or 1-10.

Customers rate their experience on a scale, often with options like:

- 1-5 Scale: 1 - Very Difficult, 2 – Difficult, 3 – Neutral, 4 – Easy, 5 - Very Easy.

Typical CES questions are:

- How easy was it to [specific interaction, e.g., resolve your issue] with our company?
- How much effort did you personally have to put forth to handle your request?

### CES Survey Structure:

#### 1. Primary Question:

- On a scale of 1 - 5, How easy was it to [specific interaction] with our company?

#### 2. Follow-Up Questions:

- Introduce the follow-up question by acknowledging their score on the primary question and tailoring the explanation:
  - For Low Scores (1-3): What made the process difficult?
  - for Neutral Scores (4-5): What could we do to make the process easier?
  - For High Scores (6-7): What did you appreciate most about the process?

### Distributing CES Surveys:

**Timing:** Send surveys at key moments, such as after a customer support interaction, post-purchase, or at the end of a service call.

#### **Channels:**

- Email: Automated surveys sent post-interaction.
- In-App: Pop-up surveys after completing specific actions on a website or App.
- Point-of-Sale: On-site surveys using kiosks or tablets.
- SMS: Short, direct surveys for quick feedback after service or in-store visits.
- Live Chat: Embedded surveys in customer service chat tools like [Zendesk](#).

## Tips for Effective CES Surveys

### Keep Surveys Focused:

- Limit questions to the core CES statement and one or two follow-ups.
- Avoid asking unrelated questions to keep surveys concise.

### Deploy Surveys at Key Moments:

- After customer service interactions.
- Post-purchase or during onboarding processes.
- Following self-service activities, such as using a knowledge base.

### Use Clear and Direct Language:

- Write statements that are easy to understand and reflect the customer's experience.

### Offer Multiple Channels:

- Deploy CES surveys through email, chatbots, or in-app prompts to meet customers where they engage most.

### Ensure Timely Delivery:

- Send surveys immediately after the interaction to capture fresh feedback.

### Use Dynamic Follow-Ups:

- For low scores: "What made the process difficult?"
- For high scores: "What did you like about your experience?"

### Analyse Trends Over Time:

- Track CES trends by segment, interaction type, or channel to identify recurring pain points.

### Close the Feedback Loop:

- Communicate changes made based on feedback to build trust and demonstrate improvement.

## Calculating the CES Score

CES can be calculated as an average score based on the responses received.

**Formula:**

$$\text{CES} = \frac{\text{Sum of All CES Scores}}{\text{Total Number of Responses}}$$

Example:

If 100 respondents provide a total score of 350, the CES would be:

$$\text{CES} = \frac{350}{100} = 3.5$$

A higher CES score reflects a more effortless experience for customers because it measures the ease of interactions on a scale where higher numbers indicate lower effort. A score closer to 7 shows that customers found the process straightforward and seamless, reducing frustration and increasing satisfaction. This simplicity fosters loyalty, enhances retention, and builds positive brand perception, making CES a critical metric for businesses prioritising customer-centric operations.

### Analysing Individual CES Results

**Low CES Score (1-2 on a 5-point scale):** Indicates a high level of effort required, signalling that the interaction was challenging or frustrating and likely needs improvement.

**Moderate CES Score (3 on a 5-point scale):** Implies a neutral experience where the customer didn't find it overly difficult, but there's room for simplification.

**High CES Score (4-5 on a 5-point scale):** Indicates a smooth, low-effort experience, suggesting that the customer found the interaction easy and likely satisfying.

## Strategies for Acting on CES Feedback

### Addressing Low Scores (1-3):

- Action Plan: Investigate specific pain points and implement changes.
- Example: Simplify checkout processes if customers highlight difficulties in completing purchases.

### Leveraging Neutral Scores (4-5):

- Action Plan: Identify minor areas of improvement to move customers to high scores.
- Example: Add clear instructions or FAQs to improve self-service experiences.

### Amplifying High Scores (6-7):

- Action Plan: Highlight and replicate successful processes across other touchpoints.
- Example: Use positive feedback to train teams on best practices.

### Feedback Analysis Template:

Response Category	Feedback Theme	Action Plan	Owner	Priority
Low Scores 1 - 2	Complex account creation	Streamline sign-up process	UX Designer	High
Neutral Scores 3	Limited payment options	Expand payment methods	Product Manager	Medium
High Scores 4 - 5	Quick issue resolution	Standardise successful processes	Support Lead	Low

### Tools and Integration

#### Recommended Tools:

- [SurveyMonkey](#) (£25+/mo): Customisable surveys with robust analytics.
- [Zendesk](#) (£19+/mo per user): Integrated CES surveys within support workflows.
- [Qualtrics](#) (£1,200+/mo): Advanced survey and analytics solutions.
- [Hotjar](#) (£32+/mo): Behavioural insights and survey prompts.

- [Freshdesk](#) (Free - £15+/mo): Customer support platform with CES capabilities.

**Integration Tips:**

- Sync CES data with CRMs like [HubSpot](#) to personalise follow-ups.
- Use tools like [Tableau](#) or [Power BI](#) for data visualisation.

## Continuous Improvement Framework

### Checklist for Ongoing CES Optimisation:

1. **Regular Monitoring:**
  - Weekly: Identify immediate issues.
  - Monthly: Analyse recurring themes and trends.
2. **Focus on High-Effort Areas:**
  - Prioritise improving processes with consistently low scores.
3. **Celebrate High Scores:**
  - Share successes with teams to reinforce best practices.
4. **Feedback Loop:**
  - Communicate changes and improvements to customers based on their feedback.

### **Example**

- If Customers frequently report difficulties navigating the knowledge base, redesign the knowledge base with clear categories, enhanced search functionality, and step-by-step guides.

### Key Metrics to Monitor

#### **CES Success Indicators:**

1. **Average CES Score:** Reflects overall ease of interactions.
2. **Response Rate:** Measures customer engagement with surveys.
3. **Customer Retention:** Tracks the correlation between effort and loyalty.
4. **Repeat Purchases:** Monitors the impact of reduced effort on purchase behaviour.

### Common Pitfalls and Solutions

1. **Low Response Rates:**
  - **Solution:** Simplify surveys and offer participation incentives.
2. **Survey Fatigue:**
  - **Solution:** Limit survey frequency and focus on key touchpoints.
3. **Biased Feedback:**
  - **Solution:** Ensure anonymity and use multiple channels to gather diverse responses.

## Real-World Example: Leveraging CES for Growth

**Scenario:** A software company has a low CES (3.8) for its onboarding process, with

### **Approach:**

#### **1. Feedback Collection:**

- Customers report that it's difficult to set up their accounts and start using the product.

#### **2. Action Plan:**

- **Simplify the Onboarding Process:**
  - Develop a step-by-step guide that walks users through setup, including tips for each feature.
  - Add in-app tutorials or guided tooltips to explain features as users interact with them.
- **Create Self-Service Resources:**
  - Add a knowledge base and FAQ section to cover common onboarding questions.
  - Include video tutorials for visual guidance on setting up and using features.
- **Introduce Live Chat for New Users:**
  - Offer live chat support during onboarding, allowing customers to get quick help as they set up their accounts.
  - Ensure that chat support is visible and accessible within the onboarding process.

#### **3. Outcome:**

- CES score improved to 6.2, leading to a 25% increase in completed transactions.

### **Measure Impact on CES:**

- Track CES scores before and after implementing onboarding changes to evaluate whether customer effort has decreased.
- Use open-ended survey responses to gather qualitative insights on what else could make onboarding easier.

## Workshop Framework

### Workshop Agenda:

1. **Introduction** (10 minutes): Overview of CES and its importance.
2. **Touchpoint Mapping** (30 minutes): Identify key customer interactions for surveys.
3. **Survey Design** (30 minutes): Develop questions and delivery methods.
4. **Data Analysis and Feedback Themes** (40 minutes): Categorise responses and identify trends.
5. **Action Planning** (40 minutes): Develop strategies to address high-effort areas and replicate successful practices.
6. **Review and Next Steps** (20 minutes): Finalise plans and assign ownership

### Facilitation Tools:

- Use [Miro](#) or [Lucidchart](#) for brainstorming feedback themes.
- Track action items with [Trello](#) or [Asana](#).

## CES vs. Other Metrics

**Customer Satisfaction Score (CSAT)** measures satisfaction with specific interactions, it is a vital metric for measuring customer satisfaction and improving loyalty. It evaluates specific touchpoints or overall experiences through a simple, scalable question. (See Resource Hub - [Running an Effective Customer Satisfaction Score \(CSAT\) Campaign](#))

**Net Promoter Score (NPS):** Measures loyalty by asking how likely customers are to recommend the brand. While CSAT measures satisfaction with specific interactions, NPS gauges overall brand perception. (See Resource Hub - [Running an Effective Net Promoter Score \(NPS\) Campaign](#))

Together with CES, CSAT and NPS provide a well-rounded view of customer satisfaction, loyalty, and ease of experience.

By measuring CES at critical touchpoints, brands gain actionable insights into how effortless customer interactions are and which areas create friction. Regularly tracking CES allows businesses to identify high-effort processes, streamline customer journeys, and proactively address barriers that impact the overall experience. A lower-effort experience not only boosts satisfaction but also fosters long-term loyalty and advocacy.



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