



# ON-HOLD MESSAGING USER SATISFACTION RESEARCH

NOTE: TELEPHONE ON HOLD DID NOT COMPILE THIS DATA, NOR CREATE THIS PRESENTATION. WE DID, HOWEVER, PARTICIPATE IN THIS STUDY.



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May, 2012

## 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

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.

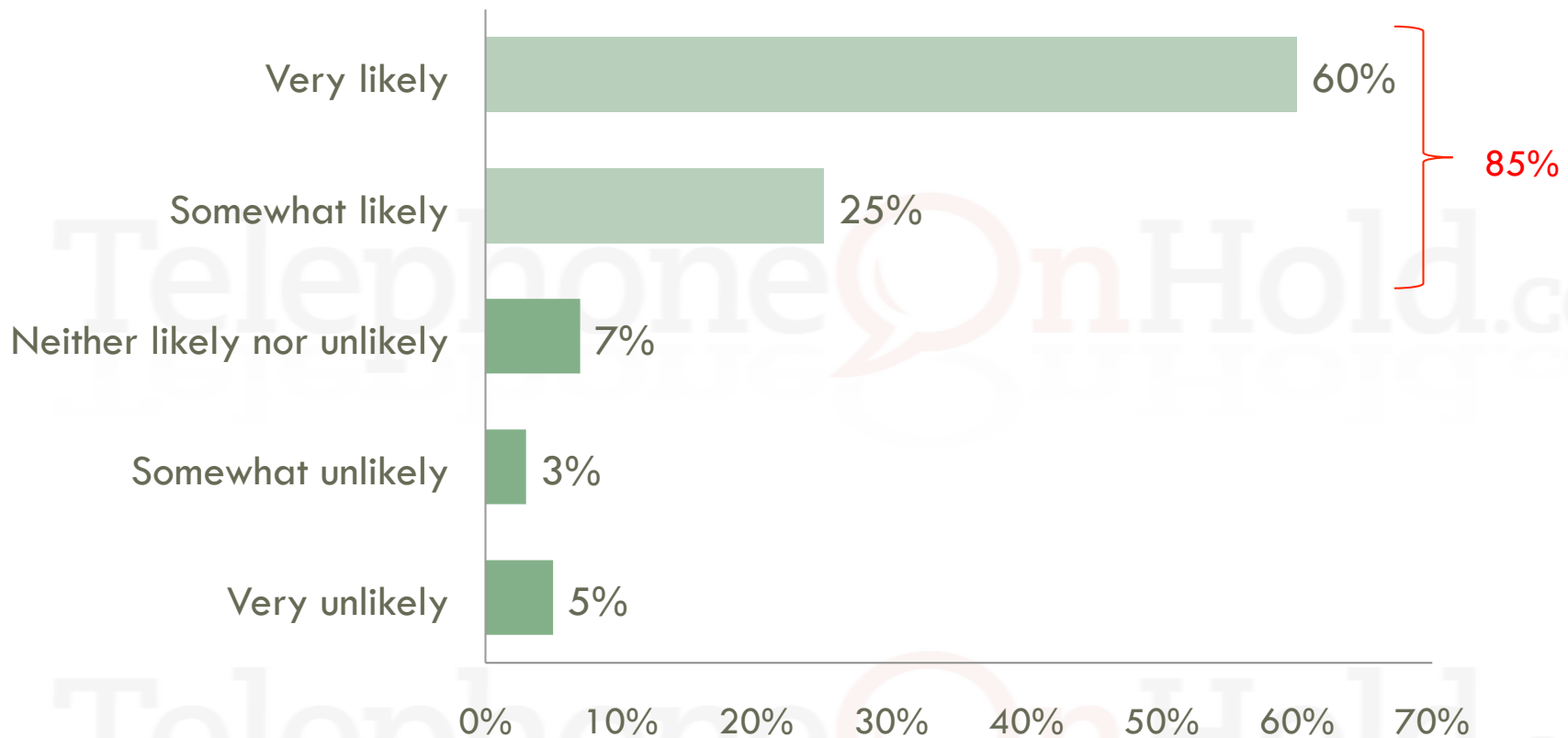
## Detailed Findings



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# 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%

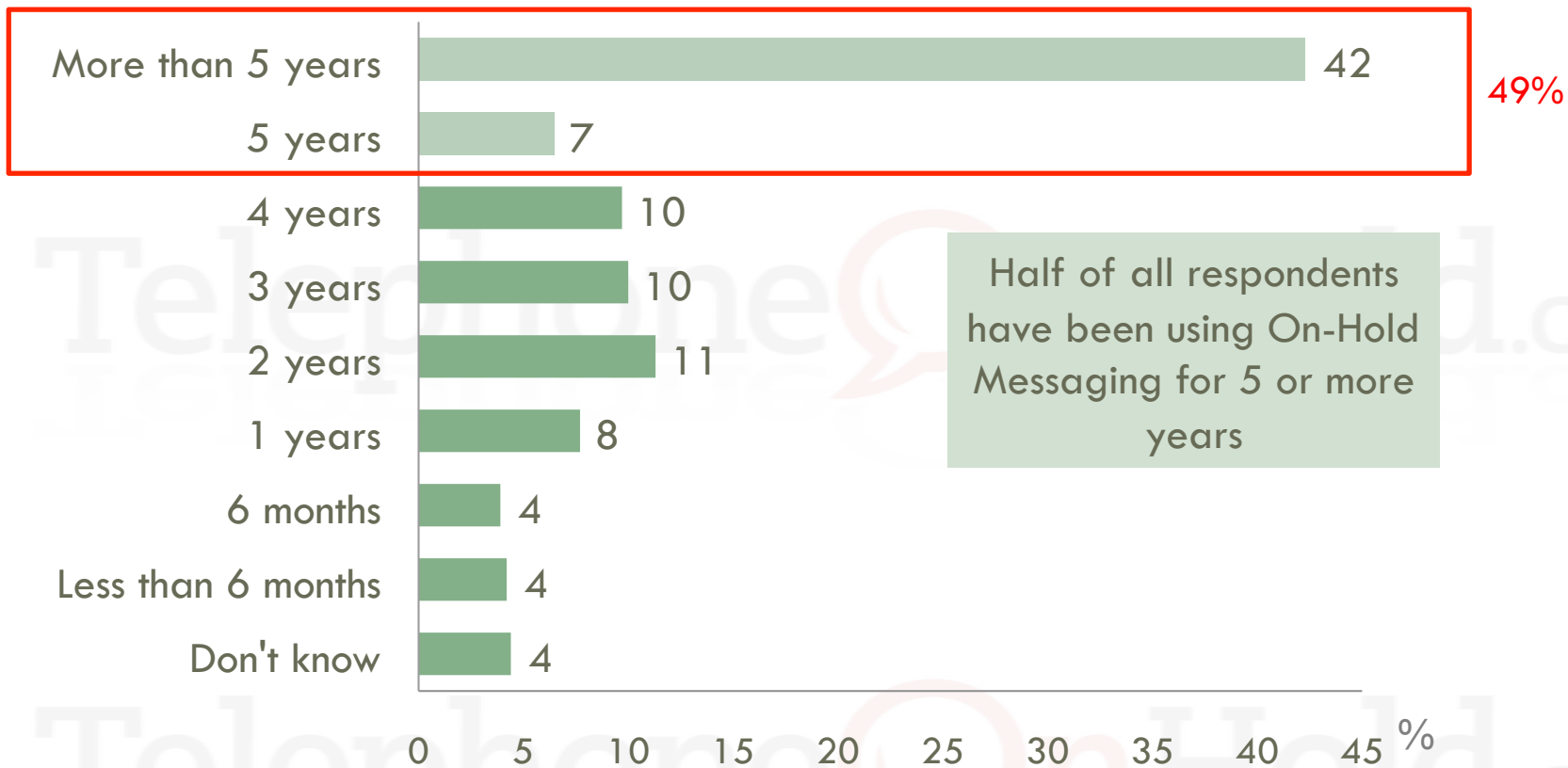
It's a necessary evil 3%

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

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



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

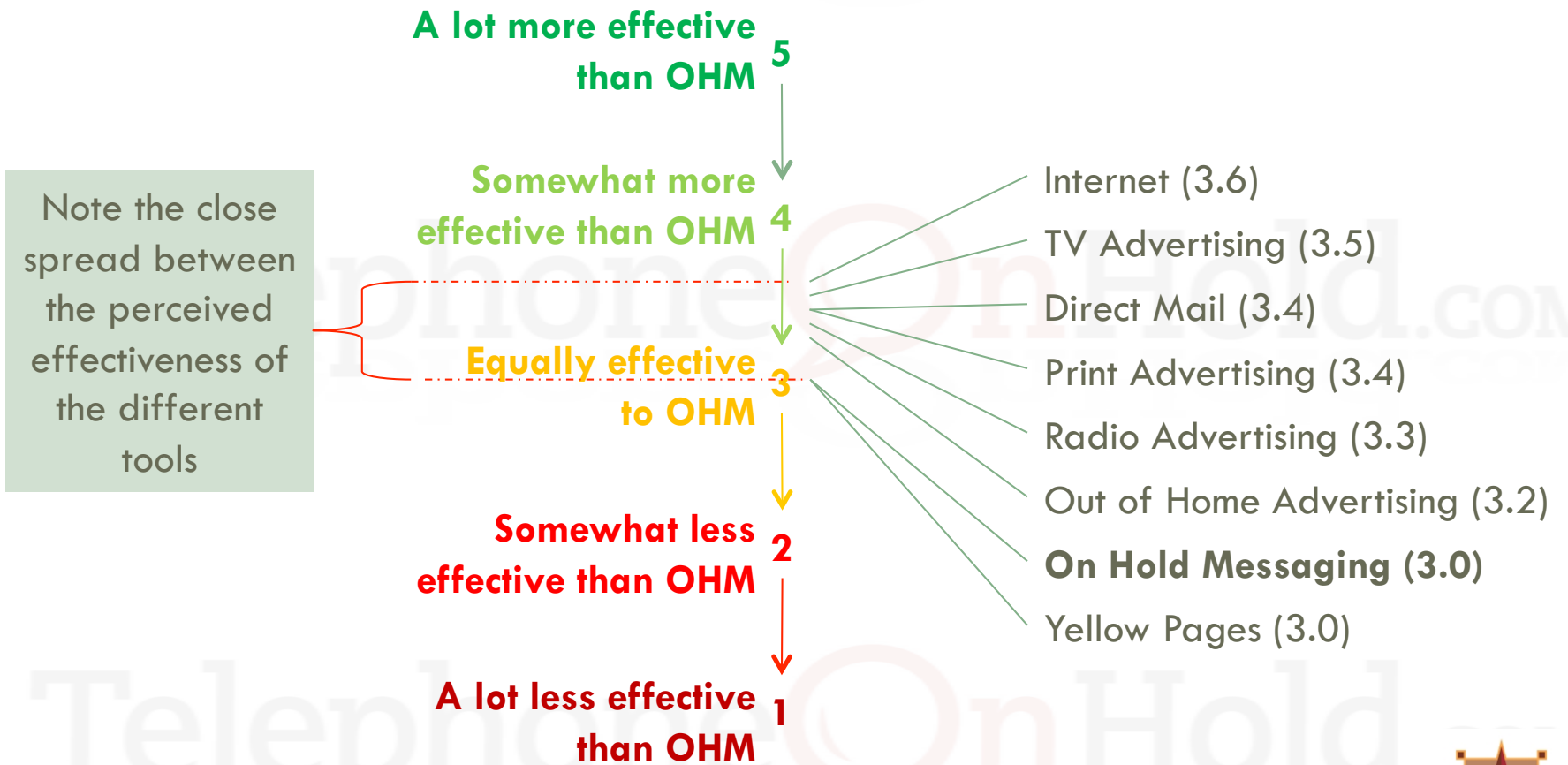


Qn 1: How long have you been using On-Hold messaging at your business? N=1,554



# 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



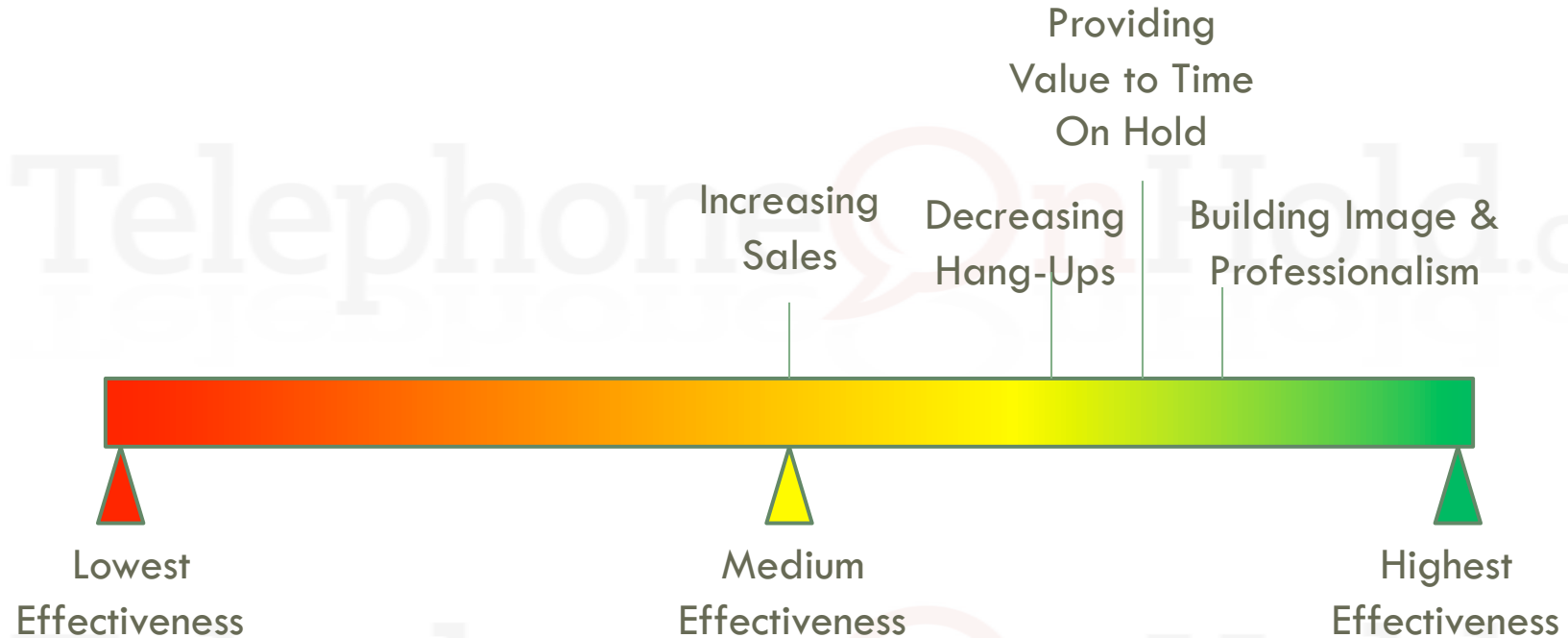
Qn 15: How would you rate the effectiveness of your On Hold messaging in growing your business, compared to other forms of marketing you use? Please select a number from 1 to 5 for each row, where 1 is the lowest score and 5 is the highest. N=1,362

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



3b

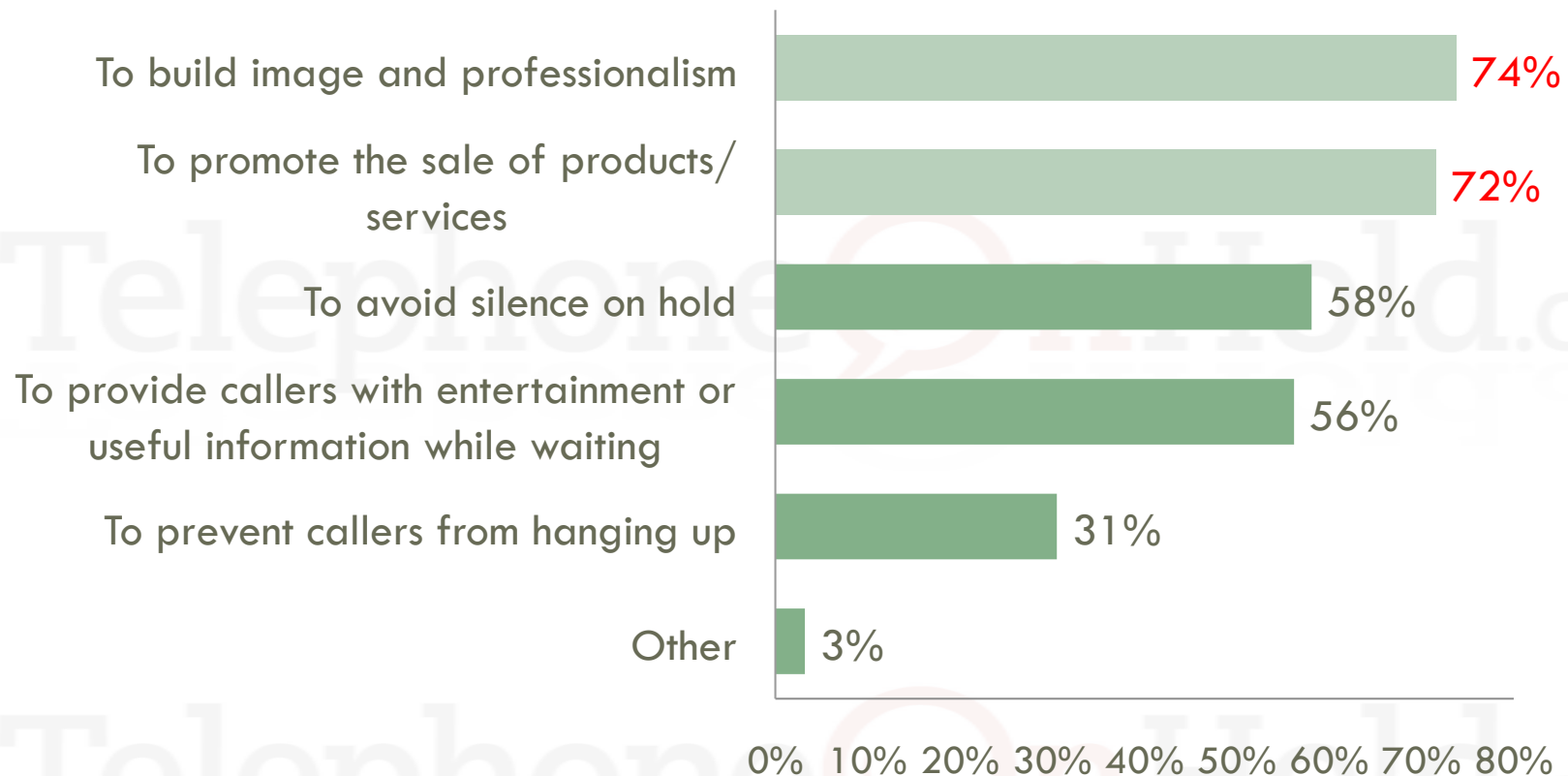
## Reasons for Purchasing OHM



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

Reasons for Purchasing On Hold Messaging

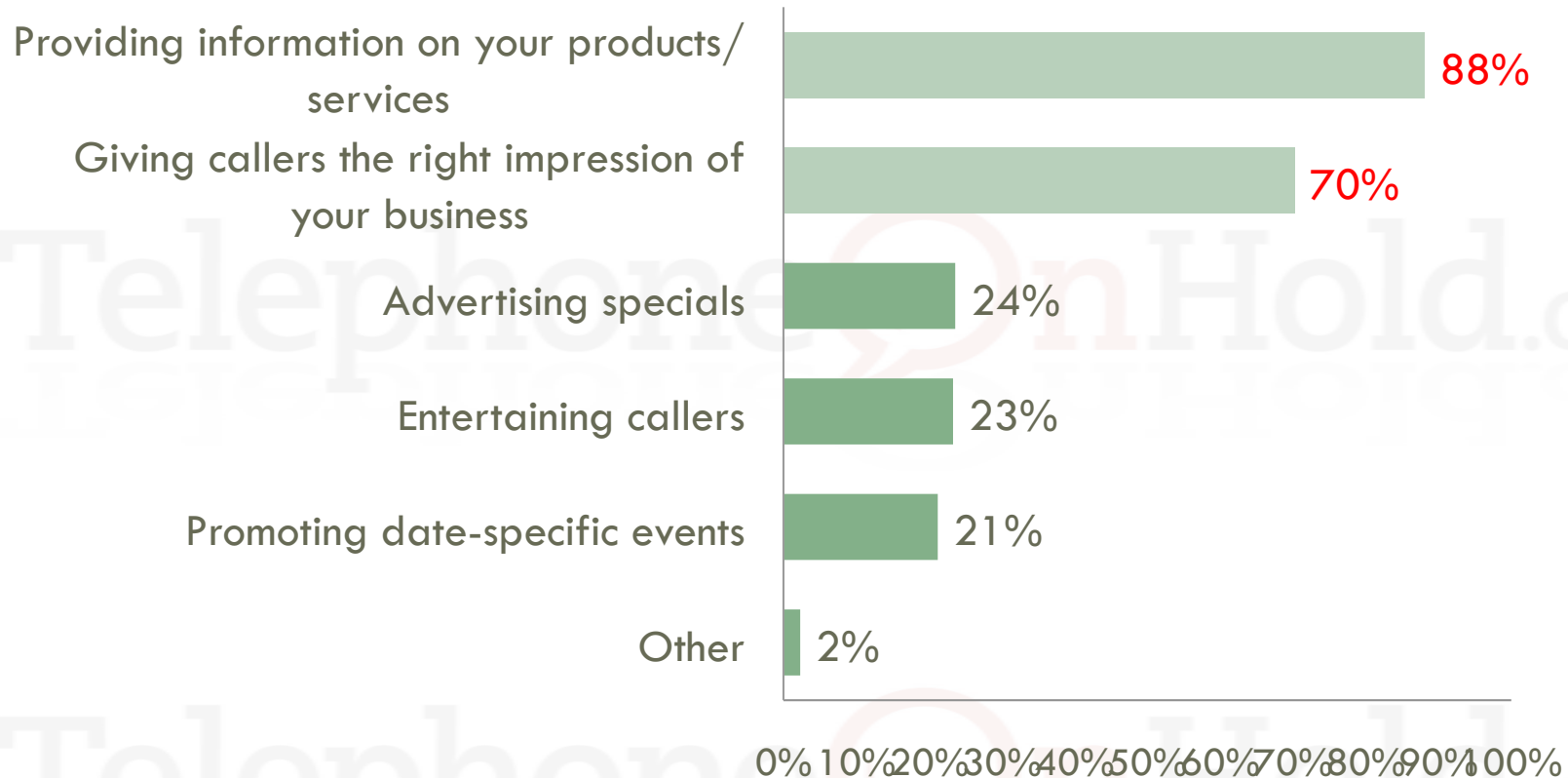


Qn 10: Why did your company purchase On Hold messaging? Please select all that apply. N=1,080



## 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



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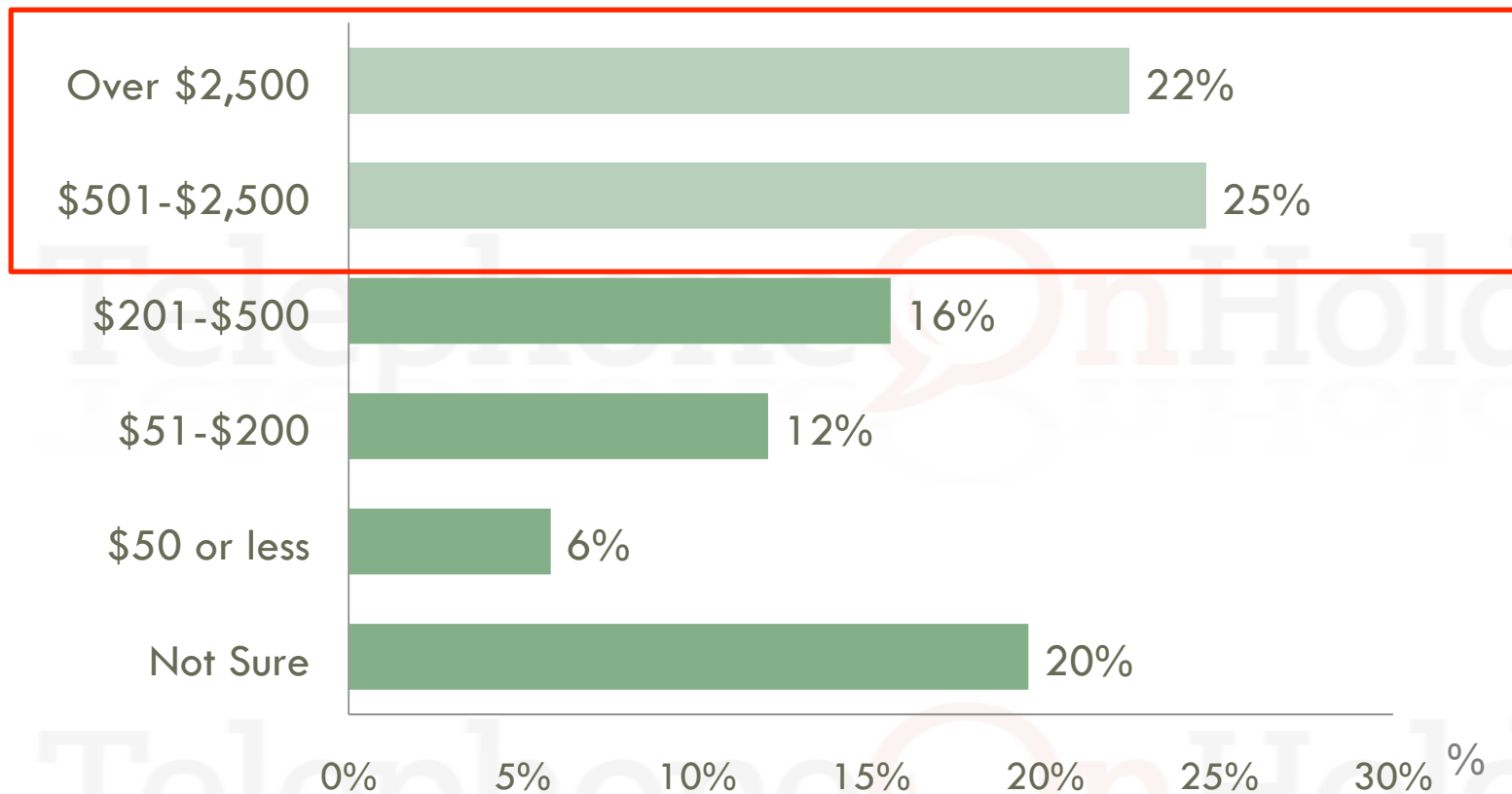
## Impact of OHM



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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



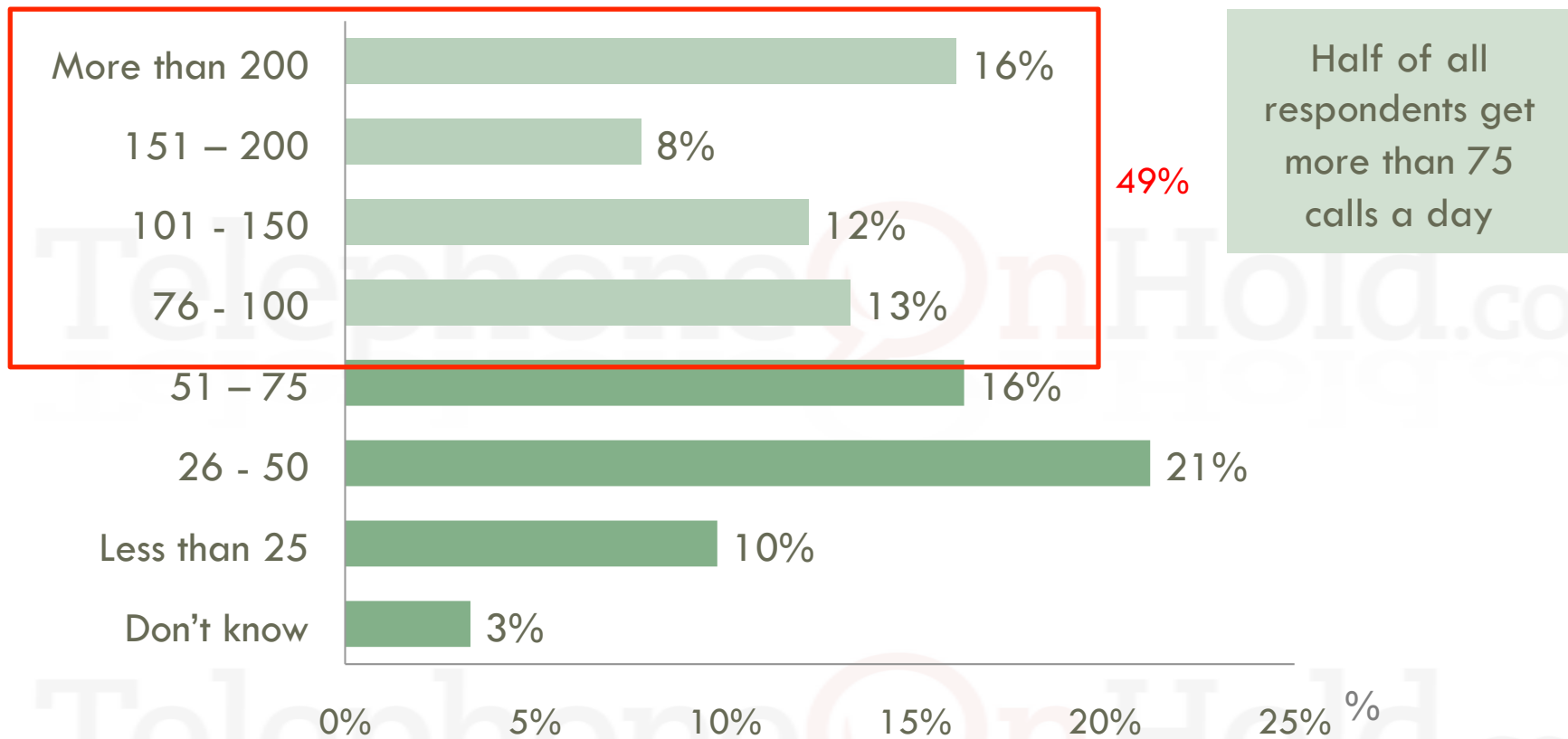
47%

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

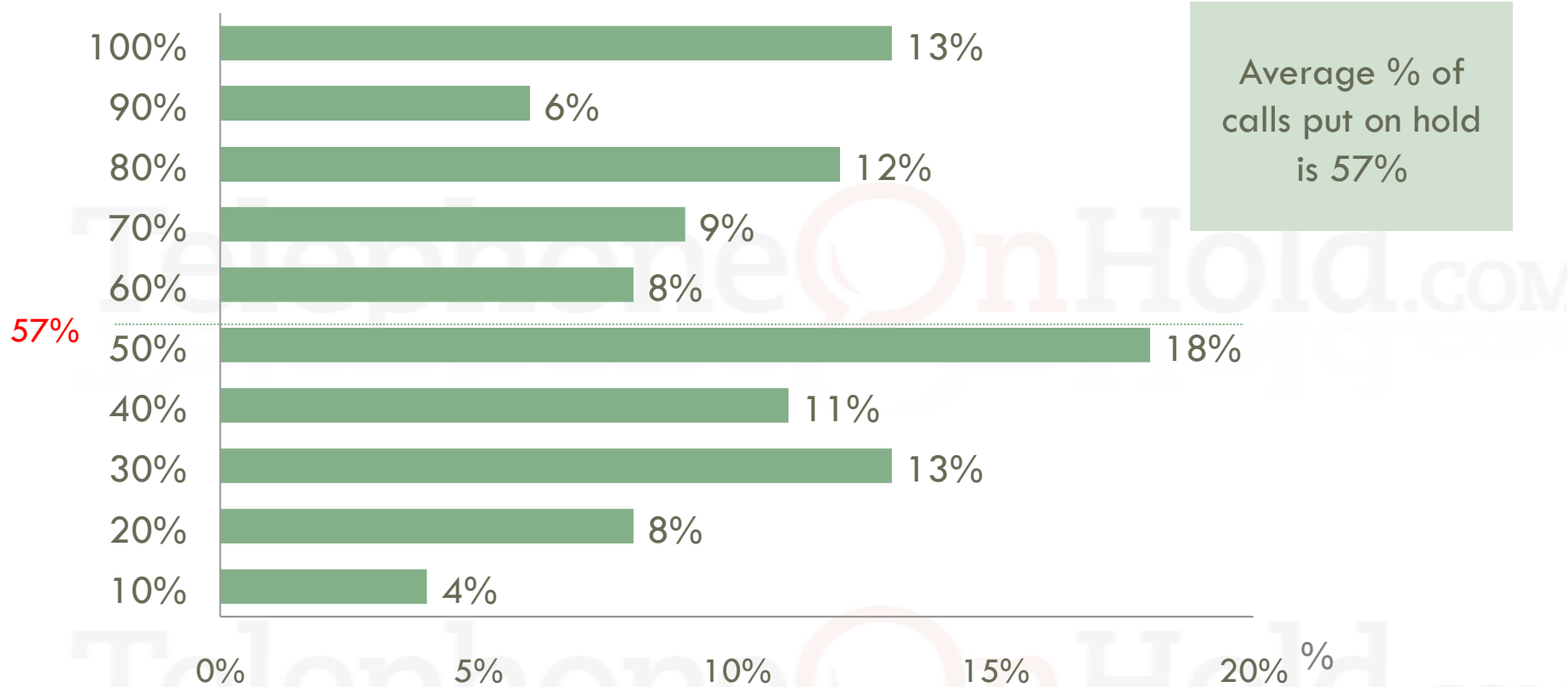


Qn 5: How many calls does your location receive on a typical day? Your best guess is fine. (If your business has more than one location, please answer this question for an "average" location in your business.) N=1,505



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

% of Calls Put On Hold/Transferred

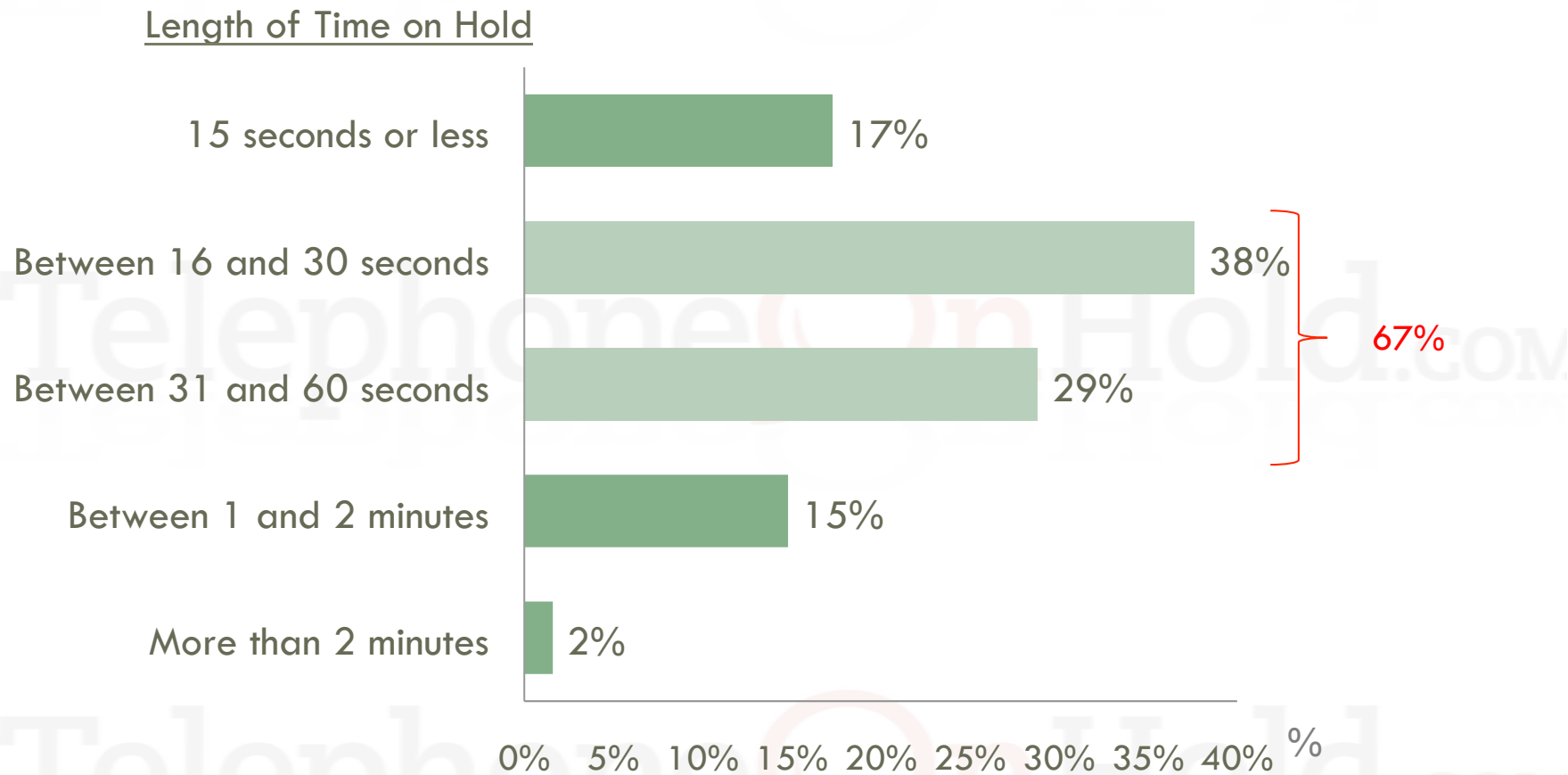


Qn 6: Out of every 10 calls you receive, how many would you estimate are placed on hold or transferred at some point during the call? N=1,511





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



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

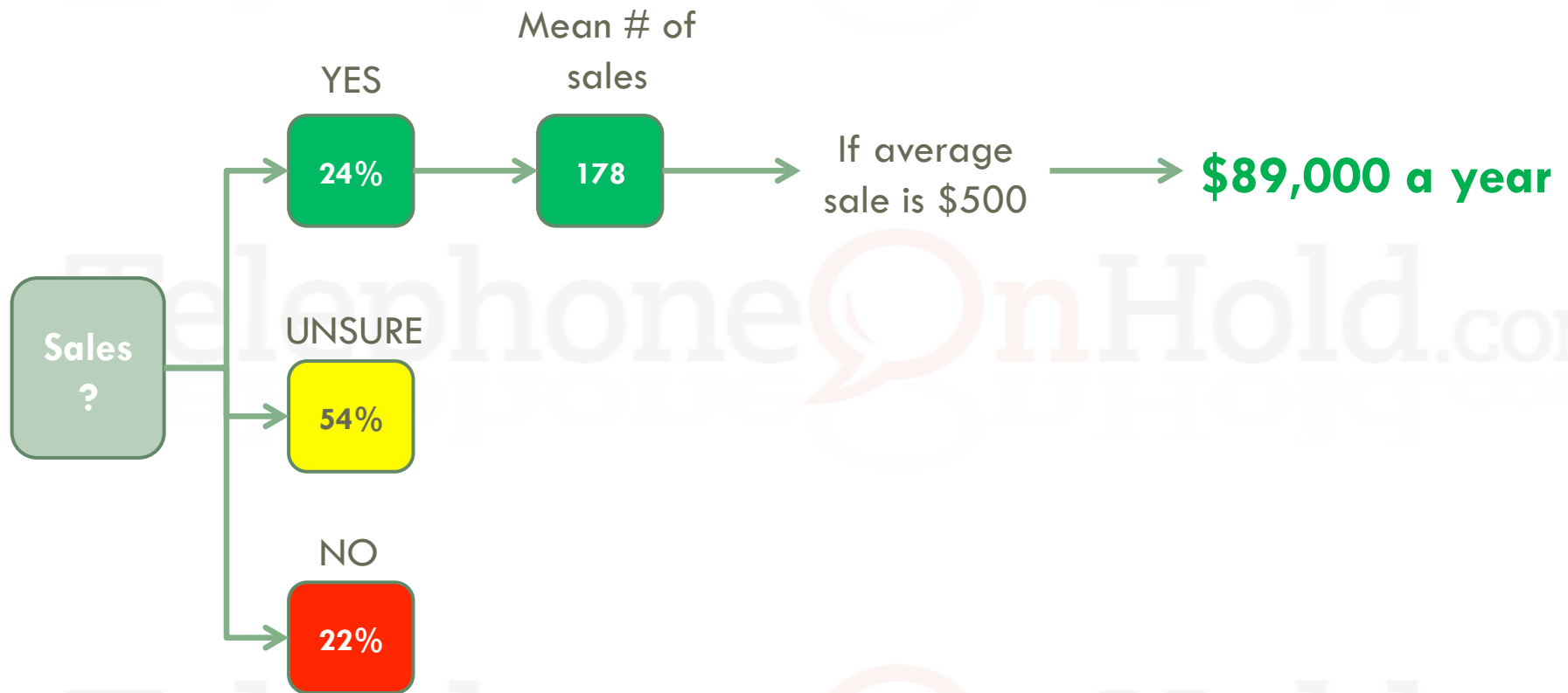
- 100 calls a day....
- 57% on hold ...
- Typical hold time of 30 seconds...



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.”



# 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

