

**SME Development Fund (SDF)/  
Dedicated Fund on Branding, Upgrading and Domestic Sales (BUD Fund)  
(Organisation Support Programme) (OSP)**

**Final Report on Approved Project**

Project ref. no.	:	<u>D15 001 004</u>	
Project title	:	<u>Striving Customer Service Excellence through Smart Resource Re-engineering</u>	
Period covered	:	From <u>15/09/2015</u> (dd/mm/yy)	to <u>14/12/2016</u> (dd/mm/yy)

## 1. Project Details

(Please mark with "\*" if any of the following project details is different from that in the project proposal appended to the project agreement.)

### Project Summary (in about 150 words)

Project D15 001 004 is the Association's 5<sup>th</sup> project of SME Development Fund (SDF) funded by The Trade and Industry Department (TID), named "Striving Customer Service Excellence through Smart Resource Re-engineering" (善用資源 追求卓越服務), aimed to establish a standard habit and an institutional measurement on service workflow in order to help SME retailers stay competitive in retail market.

This project has been completed in December 2016 starting from September 2015. A total of 400 SME retailers and 1,000 retail practitioners were benefitted in this project, well received by participants and a high satisfaction rate of 97% was recorded in our survey.

### Project Objective(s) (in about 80 words)

The core objective of this project is to introduce the application of Customer Journey Mapping (CJM). It is a process to map out the total customer experience across all touch-points between customers and the retailers, from initial contact, through purchasing, after-sales support, and repurchase. Through the mapping process, the SME retailers would be able to find out critical factors affecting the customers' attitude towards the brand either positively or negatively, and formulate an end-to-end and effective customer service workflow by applying CJM.

### Grantee/Collaborating Organisation/Implementation Agent

Grantee : Hong Kong Retail Management Association Limited

Collaborating Organisation(s) : 1. The Hong Kong Council of Social Service - HSBC Social Enterprise Business Centre  
2. GS1 Hong Kong Limited  
3. Hong Kong Retail Technology Industry Association Ltd

Implementation Agent(s) : N/A

### Key Personnel

	<u>Name</u>	<u>Company/Organisation</u>	<u>Tel No. &amp; Fax No.</u>
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### Project Period

	<u>Commencement Date</u> (day/month/year)	<u>Completion Date</u> (day/month/year)	<u>Project Duration</u> (No. of months)
As stated in project agreement	15 September, 2015	14 December, 2016	15 months
Revised (if applicable)			

## 2. Summary of Project Results

### Project Deliverables

(Please list out the project deliverables as stated in the project proposal appended to the project agreement and provide details related to the actual result achieved for each of them.)

	Project deliverable	Quantifiable target number (e.g. 100 participants)	Actual result achieved (e.g. 90 participants)	Reasons for not achieving the target, if applicable (e.g. The total number of registered participants was over 120. However, some of them did not show up eventually. Will strengthen promotion and try to make up for the shortfall in the following two seminars.)
a)	Kick-off Seminars (5 in total)  1. 5 Nov 2015 2. 10 Nov 2015 3. 12 Nov 2015 4. 17 Nov 2015 5. 24 Nov 2015	300 participants (150 companies)  60 participants 60 participants 60 participants 60 participants 60 participants	225 participants (117 companies)  43 participants 38 participants 49 participants 61 participants 34 participants	<ul style="list-style-type: none"> <li>- 225 participants (117 companies) were attended out of 346 registrations (187 companies).</li> <li>- 75% of attendance was reached.</li> <li>- The absence rate for free-of-charge and ceremonial activities are normally higher.</li> <li>- Event highlight was covered by Job Market on 17 November 2015.</li> </ul>
b)	CJM Workshops (10 in total)  1. 14 Jan 2016 2. 24 Feb 2016 3. 26 Feb 2016 4. 3 Mar 2016 5. 8 Mar 2016 6. 22 Mar 2016 7. 30 Mar 2016 8. 13 Apr 2016 9. 22 Apr 2016 10. 29 Apr 2016	300 participants (150 companies)  30 participants 30 participants 30 participants 30 participants 30 participants 30 participants 30 participants 30 participants 30 participants	238 participants (132 companies)  28 participants 24 participants 10 participants 26 participants 21 participants 19 participants 26 participants 14 participants 33 participants 37 participants	<ul style="list-style-type: none"> <li>- 238 participants (132 companies) were attended out of 288 registrations (145 companies).</li> <li>- Nearly 83% of attendance was reached.</li> <li>- Feedbacks were received from participants that, due to the downturn of economy and shortage of manpower, priority would be given to business development.</li> <li>- Low participation rates recorded on 26/2 and 13/4 were due to Chinese New Year holidays and extreme bad weather of BLACK signals respectively.</li> <li>- CJM Workshop video was launched on SME website and blasted to all absent participants in early May 2016 for their study.</li> </ul>
c)	Clinic Service (50 sessions in total)  1. 9 Mar 2016 (3 sessions) 2. 16 Mar 2016 (4 sessions) 3. 31 Mar 2016 (4 sessions) 4. 12 Apr 2016 (4 sessions)	300 participants (150 companies)  24 participants 24 participants 24 participants 24 participants	169 participants (98 companies)  9 participants 9 participants 16 participants 14 participants	<ul style="list-style-type: none"> <li>- 169 participants (98 companies) were attended out of 292 registrations (145 companies).</li> <li>- Nearly 58% of attendance was reached.</li> <li>- Two pre-requisites had to be fulfilled before participants entering into clinic service: attended the CJM workshops and prepared an implementation report for sharing. Participants showed</li> </ul>



	<b>Project deliverable</b>	<b>Quantifiable target number</b> (e.g. 100 participants)	<b>Actual result achieved</b> (e.g. 90 participants)	<b>Reasons for not achieving the target, if applicable</b> (e.g. The total number of registered participants was over 120. However, some of them did not show up eventually. Will strengthen promotion and try to make up for the shortfall in the following two seminars.)
	5. 19 Apr 2016 (4 sessions) 6. 21 Apr 2016 (4 sessions) 7. 26 Apr 2016 (4 sessions) 8. 3 May 2016 (4 sessions) 9. 5 May 2016 (4 sessions) 10. 10 May 2016 (4 sessions) 11. 12 May 2016 (4 sessions) 12. 17 May 2016 (4 sessions) 13. 19 May 2016 (3 sessions in half day)	24 participants 24 participants 24 participants 24 participants 24 participants 24 participants 24 participants 24 participants 12 participants	12 participants 13 participants 12 participants 16 participants 13 participants 17 participants 19 participants 10 participants 9 participants	that the low attendance rate was caused by workload in preparing the report under a shortage of manpower. - We shall take the feedbacks received from participants into consideration for future project enhancement.
d)	Service Excellence Recognition	150 SME companies	78 SME companies	- We received 98 registrations which had completed the workshop and clinic service and entitled to join the recognition scheme. - 20 companies were withdrawn due to limited manpower on preparing themselves for assessment or no physical shops for assessment. - Mystery Shopper Assessment were conducted for 78 SMEs finally.
e)	Company Visit (3 in total)  1. 8 April 2016 2. 6 September 2016 3. 4 November 2016	75 participants  25 participants 25 participants 25 participants	84 participants (59 companies)  34 participants 25 participants 25 participants	- 84 participants were attended out of 130 registrations, which represented 112% of attendance. - These visits were well received by the SMEs.
f)	Sharing Conference	150 participants	89 participants (63 companies)	- 89 participants were attended out of 132 registrations. - Nearly 67% of attendance was reached. 59. - The absence rate for free-of-charge and ceremonial activities are normally higher.



**Details of the deliverables (e.g. date, duration, venue, speaker, topic discussed, etc.)**

(Please list out in table format if necessary.)

**A. Experiential learning**

To assist SME retailers to grasp the knowledge of CJM and implement the strategy successfully, the following activities were organized:

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1. Kick-off Seminars

**No. of Seminars:** 5 seminars, 2 hours per seminar (60 persons per seminar)

**Actual beneficiaries:** 225 participants from 117 SMEs

(Target: 300 persons/100 companies; Registration: 346 persons/187 companies)

**Deliverables:**

- 5 kick-off seminars named "SMEs, it's time to upgrade: Go Beyond Customer Expectation with Quality Service Experience" were held on 5/11, 10/11, 12/11, 17/11 and 24/11/2015 at Hong Kong Management Association.
- Concept, framework and benefits of CJM were introduced in each seminar by Dr. Stephen Ho from Innwise Consulting Limited (Professional consultant).
- Three videos interviewing successful retailers were produced and shown during the seminars as case studies of good quality service.

**Benefit:**

- The seminars helped SME retailers to understand the concept of CJM and its importance on establishing a standard habit and an institutional measurement on service workflow to deliver quality service.
- It provided best practices to SME retailers on CJM method.
- The video interviews showcased the best practice and set as an example for SMEs reference.

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2. Customer Journey Mapping Workshops

**No. of workshops:** 10 workshops, 8 hours per workshop (15 SME retailers / 30 persons per workshop)

**Actual beneficiaries:** 238 participants from 132 SMEs

(Target: 300 persons/150 companies; Registration: 288 persons/145 companies)

**Deliverables:**

- 10 full-day of SME Customer Journey Mapping Workshops were held on 14/1, 24/2, 26/2, 3/3, 8/3, 22/3, 30/3, 13/4, 22/4 and 29/4/2016 at the conference room of Hong Kong Retail Management Association.
- The knowledge of CJM and the skills of formulating a long-term institutional service workflow with a set of practical self-help tools were introduced in each workshop by Mr. Paul Ma, the Consultant of Ward Howell International (Hong Kong) Limited.
- Related techniques and a set of practical self-help tools (including analysis tools and training tools) were provided to conduct fast and effective training and implementation. A set of card game training tool is also given to each participating company for practice and staff training on good quality service.

**Benefits:**

- (1) The participating companies grasped the knowledge and skills of CJM and formulate a long-term institutional service workflow.
  - (2) It helped the participating companies to establish a standard habit and an institutional measurement on service workflow according to the nature of each category.
  - (3) The SME retailers could implement the new service workflow easily by using the provided tools.
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### 3. Clinic Service

**No. of clinics:** 50 clinics in 12.5 days (2 hours per clinics, 4 clinics per day)

**Actual beneficiaries:** 169 participants from 98 SMEs

(Target: 300 persons/150 companies; Registration: 292 persons/145 companies)

**Deliverables:**

- 50 Clinics were held in 12.5 days on 9/3, 16/3, 31/3, 12/4, 19/4, 21/4, 26/4, 3/5, 5/5, 10/5, 12/5, 17/5 and 19/5 (half day) at the conference room of Hong Kong Retail Management Association.
- Each clinic was conducted in a group of 2-3 SME retailers.
- It was a follow-up session of the workshops conducted by professional consultant, Mr. Paul Ma and Mr. Jeff Lee from Ward Howell International (Hong Kong) Limited.
- Each participating company presented and shared their progress and problem they were encountering in implementation during the clinic, while the consultants had provided feedback and advice for their further improvement.

**Benefits:**

- (1) The participating SME retailers got advice from the consultant for further improvement.
  - (2) The service served as a good platform for SME retailers to exchange and share their experiences and ideas with their counterparts.
  - (3) During the process, the SME retailers could identify the strength and weaknesses and seek for further improvement with consultants' advice.
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### 4. Company Visit

**No. of visit:** 3 visits, 2 hours per visit (25 persons per visit)

**Targeted beneficiaries:** 84 participants from 59 SMEs

(Target: 75 persons/39 companies; Registration: 130 persons/87 companies)

**Deliverables:**

- 3 Company visits were arranged for 84 retail practitioners in total, including Tao Heung on 8/4/2016, T Hotel on 6/9/2016 and Bossini on 4/11/2016.
- The companies shared their corporate views, best practice of quality service and valuable experience people management to the participating companies.
- These visits were well received by the participants, which achieved the 173% of the target participants. However, due to venue limitation, the visit to T Hotel and Bossini had to restrict the final number of participants to 25 each on site.

**Benefit:**

The participating companies learnt the best practice of quality service and people management from the visited enterprises. These visits served as a practical exchange and direct observation among SMEs and large scale enterprises.

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## **B. Recognition Scheme**

In order to recognize the dedication and commitment of participating SME retailers, a Recognition Scheme were organized with details as follows:

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### **1. Service Excellence Recognition**

**No. of recognition:** 10 recognitions / 8 companies

(3 Top Service Excellence Recognitions + 7 Category Recognitions)

**No. of assessments:** 738 assessments for 78 SMEs from June to August 2016

**Actual beneficiaries:** 78 SMEs

(Target: 150 companies; Registration: 98 companies)

#### **Deliverables:**

- The participating SME retailers, who had attended the workshop and clinic, were eligible to join this Recognition Scheme.
- 738 assessments were done for 78 SMEs through Mystery Shopper Programme (MSP) to measure the customer satisfaction level during June to August 2016.
- Top 3 companies with the highest score of the whole programme and 7 companies with the highest score of its category were given recognition according to the assessment result.
- Recognized companies were granted for certificates and window stickers for promotion. They also received mass publicity through printed and online media to share their successful cases.

#### **Benefit:**

- The recognition encouraged SME retailers to achieve service excellence hence uplifting the overall customer service standard.
  - Mystery Shoppers Programme (MSP) was adopted as the assessment tool to provide throughout assessment reports and analysis to review customer service level of participating SME retailers with useful benchmarking indicators and recommendations for improvement.
  - The MSP reports showed the service performance of individual outlets, overall average performance as well as service gap against the best SME retailers.
  - The figures were useful indicators for improving service level and business development.
  - The recommendations helped SME retailers to understand their weaknesses and strengths as well as the business positioning to compare with same category retailers, and thus to devise improvement strategies to upgrade their competitiveness in the market.
  - Through recognition, the recognized companies acted as a role model of quality service to the industry. It arouses the SME retailers' awareness of the importance of formulating a long-term institutional service workflow to deliver quality service.
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## 2. Sharing Conference of Striving Customer Service Excellence through Smart Resource Re-engineering

**Actual beneficiaries:** 89 participants from 63 SMEs

(Target: 150 persons/75 companies; Registration: 132 persons/87 companies)

### **Deliverables:**

- It was a 2-hour conference held at the Auditorium of Christian Family Service Centre Headquarters on 8 December, 2016.
- 2 prominent speakers, Ms. Erica Yuen (袁彌明), the Founder and Director of Mi Ming Mart and Mr. Paul Ma, Partner of Ward Howell were invited to share experience and insight on quality customer experience.
- 3 Top Service Excellence Recognitions & 7 Category Recognitions were presented to 8 participating SME retailers. They were also invited to share their successful cases in the conference.
- Newspaper supplements on the Sharing Conference were covered by Job Market on 13/12/2016 and HKET on 10/12, 12/12 and 13/12/2016. It created an ambiance of SME business knowledge sharing over public platform.

### **Benefit:**

- The event served as a good platform to celebrate the learning effort paid by the participants in the previous 18 months.
- Participants could learn from the insightful sharing from the speakers and have a deeper understanding on the service standards through the analysis of MSP finding.
- The award presentation granted recognitions to outstanding SMEs which is helpful for their business development. The awardees set as a role model for other SME retailers' reference.

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## **C. Case Sharing and On-going Sharing**

To share industry wisdom, promote the success stories and benefits of the programme, the following case sharing activities were organized:

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### 1. Case Learning through newspaper supplements and online channels

**Actual beneficiaries:** Mass

### **Deliverables:**

- Successful story of the 8 recognized SME retailers were shared through newspaper supplements and online channels, including Job Market on 9/12/2016 and HKET on 2/12, 3/12, 5/12, 6/12, 7/12, 8/12, 9/12 and 10/12/2016.
- The sharing conference was recorded in video and uploaded on SME website and YouTube for mass sharing.

### **Benefits:**

- (1) SME retailers learnt from the recognized SMEs' success through mass media.
  - (2) It reinforced the SME retailers to understand the importance of service excellence in driving business.
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## 2. Retail Guidebook

**Actual beneficiaries:** 2,000 SME retailers (Target: 2,000 SME retailers)

**Deliverables:**

- The content of the guidebook includes key concept of CJM, example workflow of different retail categories, relevant tools and case studies of the 9 recognized SME retailers.
- 1,609 copies were distributed to SME retailers through direct mail and courier, while 376 copies were distributed in HKRMA events respectively.
- An electronic version was uploaded to the SME website for mass sharing.

**Benefit:**

- It provided guidance to SME retailers for conducting CJM to establish a standard habit and an institutional measurement on service workflow themselves.
- It served as a practical and good channel to spread the CJM knowledge in retailing industry.

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### **Milestones (in chronological order)**

(# Please indicate if the milestone is completed (C), deferred (D) or not achieved (N). If it is deferred, please indicate the revised completion date. For those milestones which are deferred or not achieved, please also provide the reasons under item 2.4.)

<u>Milestone</u> (as set out in the approved project proposal appended to the project agreement)	<u>Original target completion date</u>	<u>Revised completion date</u> (if applicable)	<u>Status</u> (C/D/N) #
(a) Kick-off Seminars	November 2015 - January 2016	November 2015	C
(b) CJM Workshops	March - May 2016	January - April 2016	C
(c) Clinic Service	April - June 2016	March-May 2016	C
(d) Service Excellence Recognition	May - July 2016	June - August 2016	C
(e) Company Visits	March - December 2016	April - November 2016	C
(f) Retail Guidebook	March - December 2016	July - December 2016	C
(g) Case Learning Newspaper Supplements and online promotion	October - December 2016	December 2016	C
(h) Sharing Conference	November 2016	December 2016	C

**Future Plan for Promoting the Project Deliverables (Nil if not applicable)**

More supporting organizations would be invited to support the promotions of the projects, such as PostalPlus for SME & Hong Kong Wireless Technology Industry Association (WTIA), to reach more SMEs.

The case learning newspaper supplements and videos were role modules for the SME retailers. The supplements and videos were uploaded to SME Retailers Portal for ongoing sharing.

In order to sustain the support of SME retailers, the Association will apply for a new SME Development Fund to enhance the competitiveness and service standard of SMEs in Hong Kong.