



Consumer Behavior

Consumer Diary Analysis

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Executive Summary

Complete Corporate Services (“CCS”) is a government licensed investigation company providing support services to the legal industry.

A customer called “Bob” was referred to the CCS by a legal practitioner. Bob was the subject of damages caused by a former manager who had resigned, set up in opposition and via various conduct was in breach of her employment agreement and obligations regarding the use of intellectual property.

The paper examines Bob’s Customer Journey (“CX”) with CCS. It examines various touchpoints throughout the journey and pain points, Bob’s initial and changing perception and attitudes. It also identified Bob’s moment of truth and buying decision and associated attitude and perception surrounding this.

The paper also identified opportunity for CCS to audit its CX and enhance its customer journey. Furthermore, it significantly identified the importance of including and or involving its Legal Industry referral partners in the customer journey so to enhance further referral opportunity.

Introduction

In managing the customer journey, marketing professionals attempt to critically analyse the influence of a wide range of factors on customer decision making and purchasing behavior.

This paper will review and analyse a customer journey relating to a customer named “Bob” who seeks a service from a licensed investigation agency, Complete Corporate Services (“CCS”). Investigation services are required by Bob, the owner of “*Bobs Drafting Services*”, who has discovered that a former manager “Keith” who resigned, has removed intellectual property from the business, suspected to be a copy of the business CRM including client data, and registered designs and drawings. Intelligence suggests that Keith has set up an opposition competitor business named “*Keith’s Drafting Services*”, has convinced a number of Bob’s clients to leave and do business with him, in contravention of the restraint of trade provision of his employment agreement. Further intelligence indicates that Bob’s intellectual property (*Designs and Drawings*) are being used by “*Keith’s Drafting Services*” in breach of general copyright legislation and established precedent.

This paper will analyse and evaluate Bob’s Customer journey map (“CJM”). It will attempt to identify the *Pre-Sale Phase* Bob’s goals, awareness phase, emotions, perception of CCS, consideration phase, selection and decision-making phase, and attitudes through the customer journey including the customer experience (CX), what influenced the decision, the customer moment of truth, to engage, including *Touchpoints*.

The paper will also analyse and address the CX Innovation and Design Steps outlined by De Keyser et al. (2020) in terms of what qualities customers like Bob are looking for or expecting at the various touchpoints in the consumer journey. It also discusses what contextual data can and or should be collected to enhance touchpoints, and likely opportunities to innovate and differentiate the customer experience.

Consumer Diary

| | |
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| Service | Investigation into and identification of evidence of theft of intellectual property and breach of restraint of trade contractual arrangements by a former business manager. |
| Involvement | <p>High Involvement due to:</p> <ul style="list-style-type: none"> • The importance of the issue; • Legal nature of issue; • Potential for further litigation costs; • Level of risk and loss business is exposed to; • High needs assessment and analysis; • High variety of methodology and required to be implemented; • No guaranteed service will provide a result; • Provision of a lot of confidential business information required to be provided; • Service costs are high; • Service costs will impact upon business cash flow and resources. |
| Location | <ul style="list-style-type: none"> • The Southport offices of Complete Corporate Services (CCS) www.completecorp.com.au ; • Services to be implemented externally and where required; |
| Objective | <ul style="list-style-type: none"> • Identification and evidence of theft of intellectual property; • Identification and evidence of breach of employment agreement; • Ultimately, prevention of unlawful use of intellectual property and breach of employment agreement; |
| INPUTS | |
| Research, pre-purchase experience and touchpoints | <p>Day 1</p> <ul style="list-style-type: none"> • Meet with Lawyer regarding issue. Lawyer refers me to CCS, an investigation organisation used by the legal industry to provide evidence; • To meet with my goals, and my motivation I agree to follow my lawyer's instructions; • Prior to meeting, I undertake a Google Search of CCS, check reviews and search for any negative content. I also check the Office of Fair Trading and verify that it holds a Corporate Investigators License • Meet with investigators for 90 minutes at their Southport office, who provide introduction, some information regarding their services and history; • My past general perception of investigators was that they are not professionals; • Observe office and conference facilities and assess they are professional; |

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|--|--|
| | <ul style="list-style-type: none"> • Investigators listen to concerns and make notes; • They advise me of the necessity to have a relationship with me to achieve the objectives; • Investigators request information as follows: |
|--|--|

Provision of Mary's employment agreement;

Provision of copy and or outline of all Intellectual property subject to concerns;

Provision of information regarding business customers who have left and moved to "*Mary's Drafting Services*";

Provision of all available intelligence to brief investigators accurately and comprehensively;

- I listen to CCS overview, background, case studies and advice and strategies;
- I provide multiple answers to questions required by investigators during briefing;
- My perception is that my lawyer has referred me to the right professionals to undertake this task and that I may achieve customer satisfaction and delivery of my objectives;
- Discussions convened provided stimuli to work with them further;

Day 2:

- Attend offices of CCS and work with investigators and provide all required information;
- Work with investigators to design and consider methodology recommendations to achieve result; (120 minutes)
- Requirement to wait whilst investigators undertake analysis, evaluation and consider matter and create plan.
- During this time further losses to the business may continue;
- Anxiousness as to proposal and costs;

Day 3:

- Receive proposal via email and a follow up call;
- Consider investigation proposal. It will comprise of several strategies including further intelligence gathering, surveillance of Mary, set up of a pretext operation with engage with Mary as a potential investor and obtain copies of the intellectual property he is unlawfully using;
- Consider costs to implement proposal;
- Consider ability to pay fees;
- Consider failure of proposal to achieve results;
- Consider impact upon business of cost -v- result or no result;
- Consider Client Services Agreement;

| | |
|--|---|
| In Purchase Touchpoints | <p>Day 4:</p> <ul style="list-style-type: none"> • Meet with investigators and consider and make decision to approve written proposal as to required investigation services; • Consider and execute client services agreement; • Pay deposit of invoice for services; • Receive reassurance from investigators as to their strategy and ability; • Receive confirmation and copies of all via email; |
| In Purchase Evaluation | <ul style="list-style-type: none"> • Due diligence of the provider CCS impressed me. It is licensed, experienced and has a long history of cases and client satisfaction; • Its website articulates a lot of information clearly; • Its offices were professional; • Its personal were professional; • Listening and assessment was professional and provided confidence; • Provision of documentation articulating the situation, objectives and strategy were provided in a professional manner; • Past perceptions and attitudes about investigators were completely changed and enhanced. CCS is professional with its attendance to the matter; • Costs are high; • Finding fees to pay costs will impact the business; • What damages will occur to my business if I do not take action and wear costs; • Anxiety is however present due to costs; • Anxiety is present, because successful outcome in line with my objectives is not guaranteed; • Degree of difficulty of result is explained, outlined and documented. This causes further anxiety; • Anxiety is present knowing that the investigation and its costs could be waste of my fees. |
| In-purchase communication and outcome | <ul style="list-style-type: none"> • Despite acknowledging degree of difficulty, no guarantee, of success there is agreement to fees and investigation to proceed. I am now in hope, but still feeling anxious; <p>Day 5</p> <ul style="list-style-type: none"> • No communication with investigators. I am feeling anxious; <p>Day 6</p> <ul style="list-style-type: none"> • No communication with investigators. I am feeling anxious; <p>Day 7</p> <ul style="list-style-type: none"> • I call investigators who advise that they are stilling setting up operation; • I am concerned that further damages are occurring to my business; |

Day 8

- No communication with investigators. I am feeling anxious;

Day 9

- I call investigators who advise that they have launched operations and are waiting for Mary to respond;
- There has been no evidence obtained via surveillance;
- Further anxiety is experienced;

Day 10

- Investigators call to advise that they have positively identified Mary at “Mary’s Drafting Services” and have video evidence of this. They also have identified and have visual recordings of three (3) of my former clients attending Mary’s business premises. This evidence supports my intelligence and concerns that Mary has breached his employment agreement agreement;

Day 11

- Investigators call to advise that they met with Mary, who accepted an emailed investment opportunity. During this meeting they had lawfully recorded Mary, and Mary providing them with a client list from his CRM. He had also shown and provided them with various plans and designs. They requested that I attend their offices to examine and identify these items;

Day 12

- I attend Southport offices and confirm the client list provided was my client list and that is should not lawfully be in Mary’s possession. I listened and viewed all audio and video evidence and confirmed the identity of my clients and Mary. I also confirm that plans and drawing were done by Mary whilst in my employment and should not be in her possession now;
- Investigators make an appointment for me to attend to make a formal Affidavit identifying what I had been shown and heard;
- I am relieved that the risk of payment of fees was validated;
- I am relieved that the evidence obtained will protect my business from Mary’s actions.

Day 13,14,15

- I call CCS enquiring about formal report and evidence and am advised that this is being completed and in progress;
- I am anxious to provide the report and evidence to my lawyer and stop potential losses;

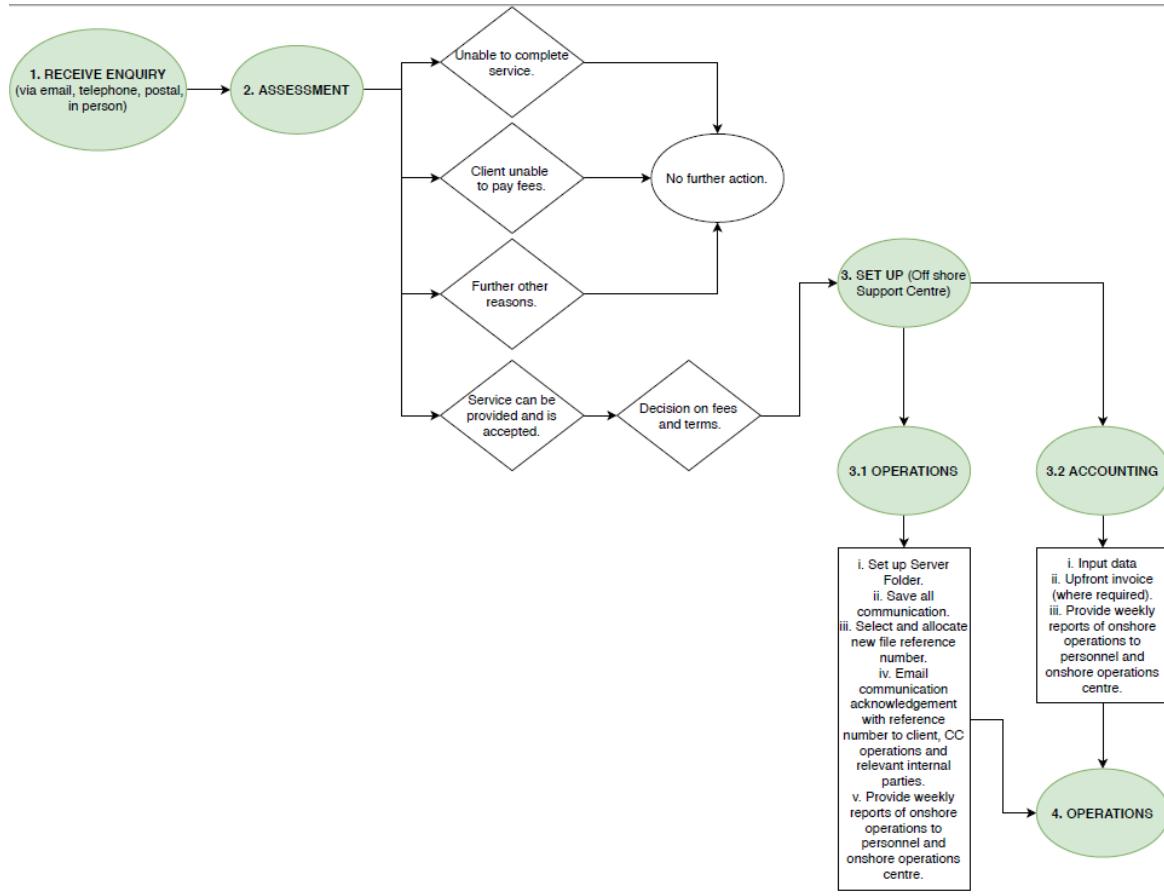
Day 16

- I receive a formal report and all evidence in the form of affidavits of Investigators and all evidence, documentary and digitally;
- I am relieved and happy I now have evidence and provide it to my lawyers;

| | |
|---------------------------------|--|
| | <ul style="list-style-type: none"> I receive balance of invoice for payment. I make payment and am happy doing so as expense was justified and well worth it. |
| OUTPUTS | |
| Post purchase experience | <p>Day 17</p> <ul style="list-style-type: none"> I provide investigators report and evidence to my lawyer. He later requests to speak to investigations. I connect parties and they communicate. My lawyer provide feedback that he is happy with evidence and work quality and is proceeding to write Mary and formally put her on notice to remedy breaches and handback unlawfully obtained Intellectual Property, with the alternative being a court application for injunctive relief. CCS investigators and evidence would be used for this purpose, if necessary; I am very happy with outcome to-date; There has been no further communication with CCS at this stage; |
| Post-Purchase evaluation | I am happy with the service, however my anxiety could have been controlled better with further communication or explanation of the process by CCS; |
| Areas for improvement | <ul style="list-style-type: none"> More comprehensive information about the process, including potential delays are required; A post service survey should be provided. Involvement of Legal Practitioner in Touchpoints. |

Analysis

The CCS Operational Process is as follows:



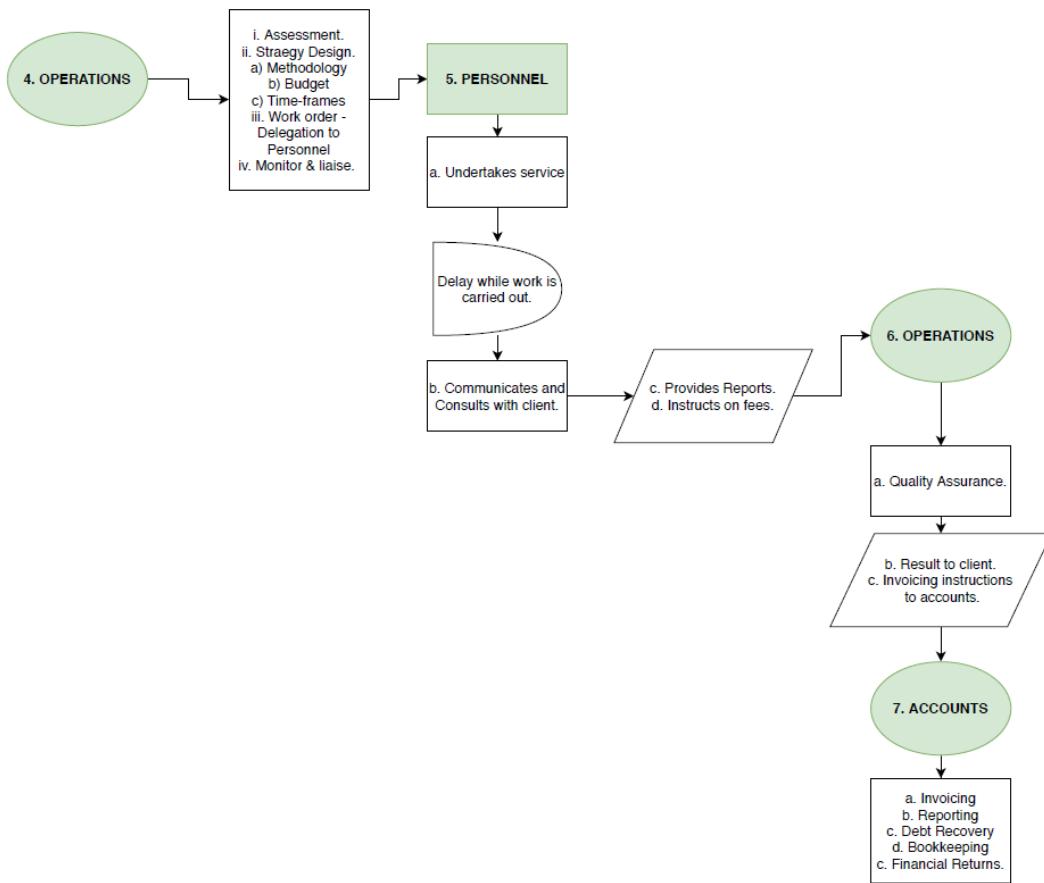


Diagram developed by Complete Corporate Services – Authority at Schedule 1

Consumer Journey Map (CJM) and Customer Experience (CX)

Bob had an objective or goal. This was to stop Mary breaching her employment agreement and unlawfully using his intellectual property (*copyright*). Bob's needs were to protect his business from the potential of loss that this could create, and was motivated by these objectives and goals and was required to engage in decision making, which was ultimately influenced by his lawyer, a professional advisor, and the touchpoints offered by CCS.

The consumer diary provided a documented Consumer Journey Map (CJM) (Primary Intelligence, 2021) and summarises the Customer Experience (CX) describing what Bob wanted to achieve in terms of his goals. As a customer it summarises his awareness phase, consideration phase, selection phase and relevant emotions during such phases in the Pre-Sale, Sale and Post-Sale phases.

“CX is a customer’s non-deliberate, spontaneous responses and reactions to particular stimuli” (Becker, 2020). Becker describes customers as have non-deliberate and spontaneous response reactions to offering related stimuli along the customer journey (C.J.). In Bob’s journey he received stimuli during the pre-sale, sale and post-sale experience by his lawyer and CCS. He reacted to these stimuli and touchpoints and his emotions were shaped by such. Any analysis of such is subjective to the context, the situation and Bob. Bob had the experience. CCS did not, but provided service-related stimuli of servicescape (Grace, 2004).

Bob’s experience was somewhat of holistic as described by (Tavsan, 2018) in that CCS took care of the entire problem in a step-by-step approach. During the journey Bob experienced sensations, feelings, cognitions and behavioral feelings evoked by brand related stimuli. (Brakus, 2009). His encounter with the service was meaningful, (Tavsan, 2018) except for the anxiety associated with committing to fees and periods when the service did not appear to be progressing and there was a lack of communication, which caused anxiety. There was interaction between the service and Bob along the journey (Tavsan, 2018). Bob struggled with *“The contribution of price variable to the total consumption experience”* (Tavsan, 2018). The proposed cost was high with no guarantee of service or outcome, and Bob knew that this high cost would ultimately affect his business cash flow. By far the biggest impact upon Bob’s customer journey was his delivery experience, which ultimately met with his goals and

objectives. The result provided a positive consumption experience (*except for delays and a lack of communication*) and “Wow” factor, which again ultimately led to his goals and objectives. The requirement for the service caused a wide range of non-cognitive emotional experiences, however the nature of CCS’s service offering created Emersion Experience for Bob.

Perception

How did Bob perceive the CCS brand and experience? Prior to his experience with CCS, Bob had a poor perception of the investigation industry which had most probably been caused through third party depictions and influences of the industry. This perception or attitude could have classed him in a general Psychographic Segment of perception of the industry. The nature of Bob’s need for the service meant that Bob’s perception was never going to reach a hedonic stage. Ultimately his perception changed along the customer journey through sensation, (ears, eyes, nose, mouth and skin) and adaption to a certain level of stimulation and adaption (Schiffman, 2014).

It commenced to change at the referral stage, however, was then enhanced through the initial digital due diligence phase, when CCS’s brand and value proposition was clearly articulated via its website.

Prior to 1994 and the advent of the internet, reputations were formed and maintained based upon personal interactions, print media publications and historical records. While powerful instruments for defining the narrative of a person, these platforms lacked the immediacy, accessibility and permanence of the Internet we know and utilise today. In a business context, reputation plays a crucial role in attracting human capital and more importantly, clients (von Helversen, 2018). Reputation is social currency traded by individuals and businesses in the pursuit of their gains. Reputation is manically curated, fought for and valuable. Reputation is a delineating factor between future customers trusting and engaging with your business or choosing competitors who enjoy a super reputation to yours. With the advent of websites, forums and social media, it is fragile and easily tarnished (Internet Removals, 2020).

Bob's perception of CCS was further enhanced after he undertook some Google searches regarding CCS. Recent statistics reveal that digital reputation impacts upon consumer perception.

(Murphy, 2020) reports that:

- 93% of consumers used the internet to find a local business in the last year, with 34% searching every day;
- 87% of consumers read online reviews for local businesses in 2020 - up from 81% in 2019;
- 31% of consumers say they read more reviews in 2020 because of Covid-19, while 34% read fewer;
- 67% of consumers say they wouldn't use a business if reviews said it didn't have Covid-19 health and safety measures in place;
- The industries in which consumers are most likely to have read reviews: 1) Restaurants, 2) Hotels, 3) Medical, 4) Automotive, 5) Clothing stores;
- The most important review factors: 1) Star rating, 2) Legitimacy, 3) Recency, 4) Sentiment, 5) Quantity;
- 60% of consumers say that negative reviews made them not want to use a business;
- Only 48% of consumers would consider using a business with fewer than 4 stars;
- 73% of consumers only pay attention to reviews written in the last month;
- 72% of US consumers have written a review for a local business – a big jump from 66% in 2019;
- When writing a review, 20% of consumers expect to receive a response within one day;
- Consumers are most likely to look at Google My Business for local business reviews but trust the Better Business Bureau the most.

The need for the service created some selective exposure in that Bob most probably was seeking messages that he liked, and which sympathised with his situation.

Price was an important consideration for Bob in terms of "*Perceived Price*", "*Perceived Quality of Services*" (Schiffman, 2014). Investigation services are highly priced and difficult to evaluate compared to products or goods. Via attributes or informational cues associated with it, Bob obviously recognized the correlation between the quality and value of the service, the need for the service, and saving by using the service, and the risk of loss by not using the service. Some cues were intrinsic to the service (e.g., *Surveillance*) whereas others extrinsic, such as the CCS

brand, office and professionalism of its investigators (Schiffman, 2014). Bob's perception was formed via Servqual framework to measure his expectations via the following dimensions. He determined that CCS would be reliable in terms of use of the correct service, time and persistence. He believed CCS would be responsive, providing prompt service and delivery with a reasonable time frame. CCS instilled confidence and tangibility with its experience and assurances. Investigators showed a great deal of empathy, caring and understanding of his situation and its service was very personalized and customized to his needs.

Moments of Truth

Moments of truth are the points in Bob's journey with CCS when key events occurred, and an opinion was ultimately formed about CCS. During the journey Bob experienced a combination of *firm-controlled* and *non-firm-controlled* touchpoints (De Keyser, 2020). The journey consisted of initial contact, orientating Bob, interaction and retention and advocacy (Varnali, 2019).

Initially, Bob entered the customer journey in pain. He was facing a difficult situation and required a service to remedy this problem. He was required to articulate a lot of information to investigators and this stage there was *equity* between what he required and what he was receiving (Tavsan, 2018). This continued throughout the assessment stage of the journey when he was providing information and receiving feedback.

During the customer journey Bob experienced several touch (*including pain*) points, and after the initial assessment process Bob experienced several *Pain-Points* “*which are the touchpoints that possess a negative gap between what customers expect and what they actually receive*” (Tavsan, 2018). Bob was expecting an answer and result, however the assessment phase delayed this, causing the negative gap between expectations and results. CCS's offer in terms of strategy, costs and a lack of guarantee of a result, was an interesting touchpoint. Bob was provided with a proposal to achieve a result. This was a milestone and provided some satisfaction, however Bob's decision to proceed was painful in terms of cost, and the speculative nature of the engagement. This was further aggravated between Bob's instructions to proceed and the time period it took CCS to obtain a result. Part of Bob's consideration was the costs associated with potential failure of the project. The eventual result by CCS was at least an *Equity Point* where Bob received an equal valance between what was expected and what was received.

The reality is that Bob probably experienced a *Pleasure Point (Wow factor)* in that the CCS result exceeded Bob's greatest concerns regarding the result.

The nature of the services provided by CCS can never be guaranteed and although it's Process Map is well defined its operating cycle is often reliant upon the actions of third parties. The initial customer journey relating to information exchange and assessment is not reliant upon any third party. CCS however could improve its communication to improve customer experience, particularly between the following two phases. That is the time between collation of information, assessment and proposal and period between instructions to proceed and result.

Decision Making

"A decision is an action resulting from the selection between two or more alternatives" (Schiffman, 2014). Bob's needs and customer journey involved extensive problem solving and his decision was based upon his and CCS's input, (variables that affect the decision-making process include external influences), the process involved (*psychological concepts, including perceived risk and the evoked set*) and ultimately, the output. Bob had a need, and in his search for information he was referred to CCS who presented a proposal for his evaluation prior to purchase. Although he could have chosen to investigate competitors' proposals, he had limited competitor alternatives and limited scope to not proceed, to protect his business. Bob's post purchase evaluation should have been positive and lacking in post-purchase cognitive dissonance (Schiffman, 2014).

Customer Exchange Audit

In examination and audit of the customer journey and associated customer perception and moments of truth, retailers have the opportunity to identify issues and propose specific actions to eliminate customer pain points.

During Bob's CCS customer journey there were several pain points. In this type of service, there are some point points which the writer suggests cannot be eliminated. A lack of guarantee of outcome cannot be eliminated due to relevant legislation (www.australiancontractlaw.com, 2013).

(De Keyser, 2020) discuss the TCQ Nomenclature; that is, Touchpoints, Context and Qualities during the customer experience (“CX”) that provide business with a way of *creating a setting in which experience are created in a favorable way to close the gap between intended and perceived CX* (Ponsignon, 2017).

Auditing and strengthening the CX and identifying its critical pain point, involves taking specific action. It includes streamlining the touchpoints through clear identification, recognizing the context of each touchpoint, assessing all delivered qualities of the touchpoint, evaluation, benchmarking and taking action (De Keyser, 2020).

During the customer journey, touchpoints Bob was looking for or expecting, were credibility, professionalism, empathy, a high level of communication and de brief, expert strategy, quality planning and proposal, a guarantee of service outcomes, price equity, and an excellent result.

Touchpoints in Bob's customer journey commenced with his introduction to the CCS. The information gathering period followed as the next touch point. After assessment, CCS's proposal, client services agreement and fee proposal were the next touch point. In play communication was a further touch point, finally followed by the result or outcome, the final touch point.

Each touch point entailed high emotion in context and were highly sensitive. The quality of communication was high despite periods where there was a lack of communication. Value was created during the information stage of the journey as this phase is not charged to the client.

The strengths of the current CX including free information gathering and assessment, high level communication and experience. Weaknesses and threats include the lack of guarantee of service, and third-party reliance. There are opportunities to reduce these weaknesses via communication and client conditioning.

Recommendations

To improve the CX (De Keyser, 2020) discusses CX Innovation and Design through the design of new touchpoints or re-design of the customer journey, via qualities or context that customers are seeking and recommends these at touchpoints.

The first step is to determine the desired experience qualities that the consumer is looking for at each step of the customer journey or touch point. CCS's digital and hard presence does not require change. As investigators CCS more than adequately determines desired experience qualities and context of its clients, however it needs to understand that required extent of quality, costumer participation and time period. It is recommended that it provides written confirmation of this in each instance, where customers in the decision-making process.

CCS identifies that need for contextual information, as this forms that basis of its service. As investigators, CCS more than adequately determines via its customer debrief all available information and intelligence, however it is recommended that it provides written confirmation of the need for each contextual information at each of its touchpoints. For example, a summary of the contextual information and desired quality should be emphasized at the touchpoint where planning and fees are articulated, minimizing the pain of this touchpoint. This can be reenforced and integrated via written and oral communication at these touchpoints.

In achieving a sought-after quality, the CCS touchpoint constellation must clearly identify and quarantine each touchpoint in the process. I.e Company image, information intake, debrief, assessment, evaluation, proposed treatment/plan, costs including the value between it, the plan, and outcome, operational execution, and outcome. The nature of the required sought-after qualities requires some tradeoff in that the customer exercises a level of input and control at the information, de brief, evaluation and planning stage, which is satisfying, enhancing brand loyalty (Kranzbuhler, 2019).

One of highest pain points is the part of the CCS customer journey occurs between the decision to engage and pay fees, and the outcome. This is the operational phase. Beyond its control, is CCS's inability to control third parties, which are central to the service and its outcome. Third

parties may be unresponsive to unresponsive to operational stimuli for a multitude of reasons, effecting the efficiency of the operating cycle (Slack, 2018). CCS must provide a higher level of communication, both orally and in writing to condition the customer as to this situation, preparing the customer for, and reducing the impact of the pain point. CCS will need to action this by experimentation, assessment and evaluation. Customer oral and written data should be recorded and analysed to determine future strategies. This could be as simple as encouraging customer feedback at each touchpoint.

Amongst the investigation industry, CCS has clearly differentiated its customer journey, however there is opportunity to continue to enhance the customer CX and thus promote customer satisfaction and loyalty.

An important consideration is the impact of the legal industry which refers cases to CCS. CCS must continue to develop communication along the customer journey to include the customers legal advisor in touchpoints and then following up with post service survey. In fact, to gain and maintain customers, strategic positioning (Schiffman, 2014) within the legal industry is key, as it is a good source of customer referrals.

CCS enjoys Umbrella Positioning (*creation of an overall image around many services that are featured individually*) amongst the legal industry. The strategy is effective against competitors who do not offer the range of services or position themselves to provide specific benefits. A legal client can also multiply the supply of customers, as opposed to competitors who market to gain one customer at a time, without referral sources. The legal industry strategy also is an unowned position, which finds a niche, filling several positions or gaps or 'unowned' perceptual positions or opportunities unfilled by other competitors. CCS should implement perceptual mapping to determine how its services appear to customers compared to competitors and identify gaps which require filling (Charles Blankson, 2008).

Conclusion

Bob has experienced a customer journey with CCS. It differed from many customer journeys in that it was a service offered and supplied, without any guarantee of success. The initial part of the customer journey and outcome impressed Bob with ‘wow’ factors, however Bob’s moment of truth was difficult as touchpoints were somewhat painful in the evaluation of the price and an equitable (*successful*) outcome. The writer submits that the customer journey in today’s marketplace commences with digital due diligence of the retailer’s online reputation. Research supports the fact that many retailers lose customers at this point.

The exercise revealed that if CCS is serious about continued improvement, it must audit its CX and work on its journey touchpoints, through touchpoint constellation, and improvement at each. CCS should also recognise the Legal practitioners who refer cases, should be engaged in the CX, and enjoy the customer experience, so as to secure ongoing referrals.

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Complete Corporate Services

ORGANISATIONAL CONSENT

I, Scott Sattler Managing Director of Complete Corporate Services (CCS) understand that **Michael John Featherstone** is a student of Australian Institute of Business. (AIB)

I further understand that the student has to complete a research project on my organisation named below:

Complete Corporate Services

I hereby consent to the student basing his research upon my organisation and confirm that I am authorised to grant this consent on behalf of the organisation.

I understand that the information obtained by the student about my organisation will be kept strictly confidential and only viewed by the student, the project examiners, and essential AIB staff, except where I have otherwise granted consent in writing.

Kind Regards

COMPLETE CORPORATE SERVICES

Per:

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