

# The Definitive Guide to Subscriber Experience

2nd edition

Ensure long-term customer loyalty by providing an exceptional subscriber experience



# **Table of Contents**

- Acknowledgements 3
- Introduction: Taking the Subscriber Experience to the Next Level 5
- Chapter 1: Transforming the Offering Strategy 7
- Chapter 2: Driving Higher Levels of Engagement 14
- Chapter 3: Striving for Continuous Improvement 17
- Conclusion 21



The first edition of the groundbreaking Calix report, *The Definitive Guide to Subscriber Experience*, started with a bold idea. During the 2022 Calix Marketer Summit, we set out to develop an industry standard for broadband subscriber experience. More than 50 leading broadband marketers and other experts brainstormed, debated, and defined what makes an exceptional subscriber experience. The culmination was a grassroots definition of the subscriber experience broadband service providers (BSPs) could use to create meaningful engagement strategies.

More than 130 broadband professionals gathered for our second annual Marketer Summit in 2023, as we focused on raising the bar even higher. Now that we've defined subscriber experience, how can BSPs optimize it? Participants covered a lot of ground—exploring how brand voice influences experience, the impact of value-added managed services, and innovative approaches to subscriber engagement.

Our marketing experts' insights, best practices, and success stories form the foundation of this second edition of The Definitive Guide to Subscriber Experience. We especially appreciate the following individuals for their contributions to advancing the subscriber experience:



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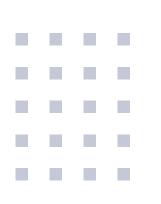


# Taking Subscriber Experience to the Next Level

When it comes to customer experience, the larger, more prominent brands typically set the standard for excellence. Brands like Toyota, Trader Joe's, and Marriott define customer satisfaction in each company's respective industry.

Large brands in the broadband industry do not set the same standard. Many of the biggest service providers have a Net Promoter Score<sup>SM</sup> (NPS®) in the single digits, with some even having a negative NPS. If anything, the Tier 1 service providers have become examples of what not to do. Fortunately, innovative local BSPs have stepped up to lead the way, delivering an exceptional experience for millions of subscribers.

In 2022, working with dozens of Calix BSP customers, we set out to define what comprises the ideal broadband subscriber experience.



# As a starting point, we identified three crucial characteristics that underpin experience:



Fanatical focus on subscribers

The best BSPs make subscriber satisfaction their top priority. They embrace a subscribercentric culture across their organizations and empower their teams to address subscriber pain points.



Commitment to community

Smaller BSPs have strong ties to their communities. Their mission is to improve subscribers' everyday lives and increase economic vitality.



Aligned communication and support

Winning BSPs make every interaction with their brand—including support—easy, seamless, and positive. Every employee, regardless of role, is an ambassador for the company.

Of course, these BSPs also have another important thing in common: They all take advantage of value-added managed services. And thanks to cloudbased technology, they can personalize the experience and provide exemplary customer service through data-driven insights. They can go beyond basic broadband to develop offerings tailored to subscribers' needs. In the first edition of *The Definitive Guide to Subscriber Experience*, we provided a framework to help BSPs move beyond the widely entrenched speed-first mindset and transform their value propositions. The second edition of the Guide goes a step further, helping BSPs optimize and elevate the subscriber experience.

In this report, we will outline how BSP marketers can deliver an exceptional subscriber experience and improve against key business metrics by:

### **Transforming their offering strategies:**

With offerings that align with subscribers' specific needs, marketers can increase acquisition, boost take rates, and increase average revenue per user (ARPU).

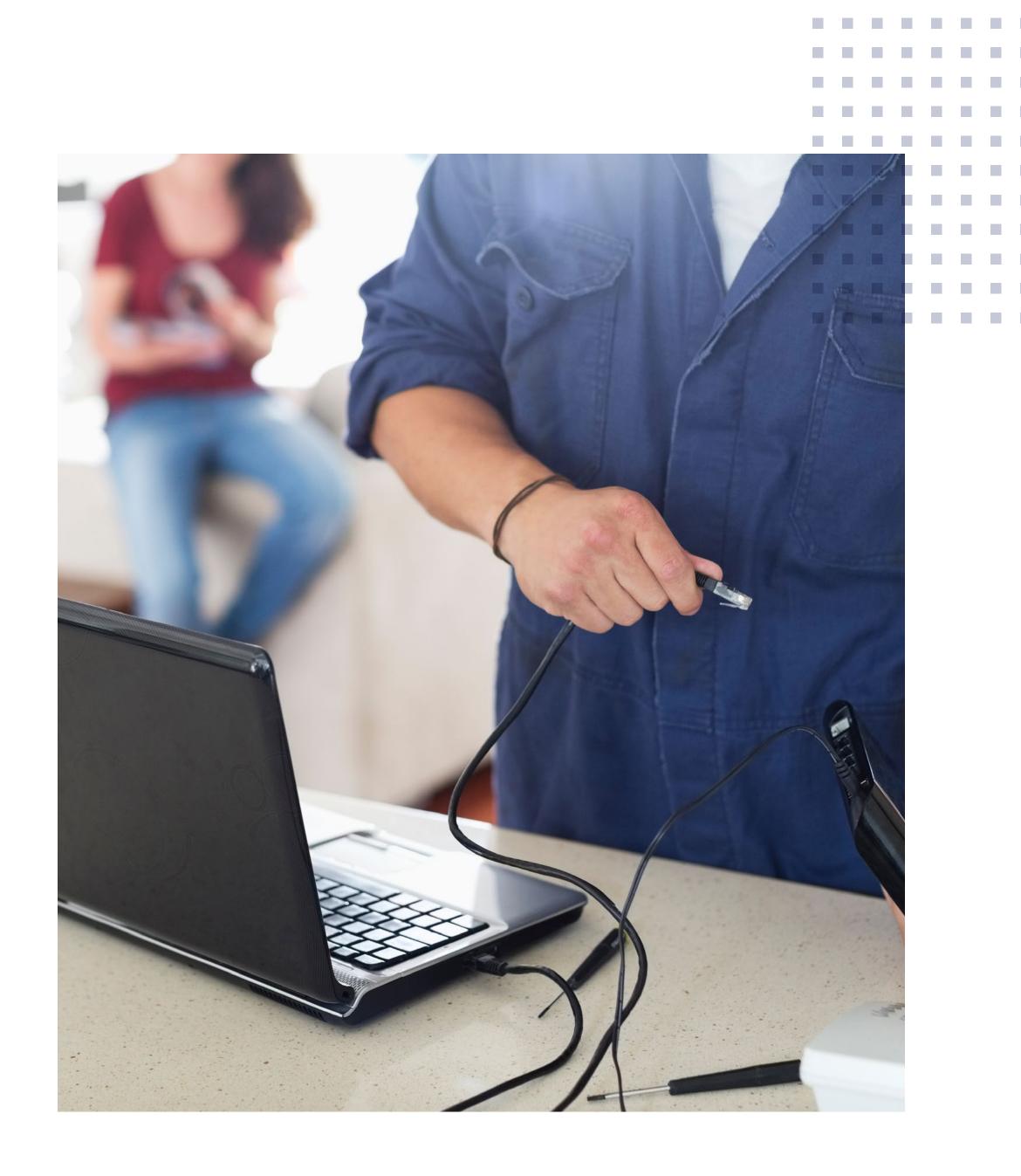
### **Driving new levels of engagement:**

By engaging subscribers instead of pushing products or executing one-way marketing tactics, BSPs can deepen the subscriber relationship, build loyalty, and reduce churn.

### Striving for continuous improvement:

Tracking quantitative and qualitative data can give BSPs valuable insights into subscriber behavior, preferences, and pain points—enhancing the subscriber experience and improving satisfaction.

Author: Naylor Gray, Area Vice President Brand and Content Marketing



# **Transforming the Offering Strategy**

Forty-three percent of U.S. households have access to fiber broadband. The figure is expected to reach 73 percent in 2026. The rising availability of high-speed internet offers tremendous benefits for individuals and communities—increasing access to essential services and contributing to economic vitality. But as broadband reaches near ubiquity, BSPs relying on speed as their primary differentiator may risk being left behind.

Competing on speed is a zero-sum game. Most subscribers can't tell the difference between 100 Mbps and 1 Gbps, nor do they care. They want their service to work. Prioritizing speed also devalues the service you provide, making it nothing more than a commodity. And when consumers can't distinguish between competitors, they always choose the cheapest option. This is particularly challenging for small to medium-sized BSPs. You cannot compete on price with the Tier 1 providers. Instead, you can differentiate your brand by delivering an exceptional subscriber experience.



percent of U.S. households will have access to fiber broadband in 2026.





### A Differentiated Offering Strategy Makes All the Difference

Marketers can develop a go-to-market strategy emphasizing their unique value to subscribers and communities. The strategy includes three key pillars: brand promise, differentiated offerings, and subscriber engagement. All three elements are critical, but a differentiated offering strategy is the linchpin.

With a differentiated offering strategy, you can move beyond the utilitarian image of traditional providers. Subscribers will view you as innovative and concerned with their unique needs. This approach offers a wide range of benefits:

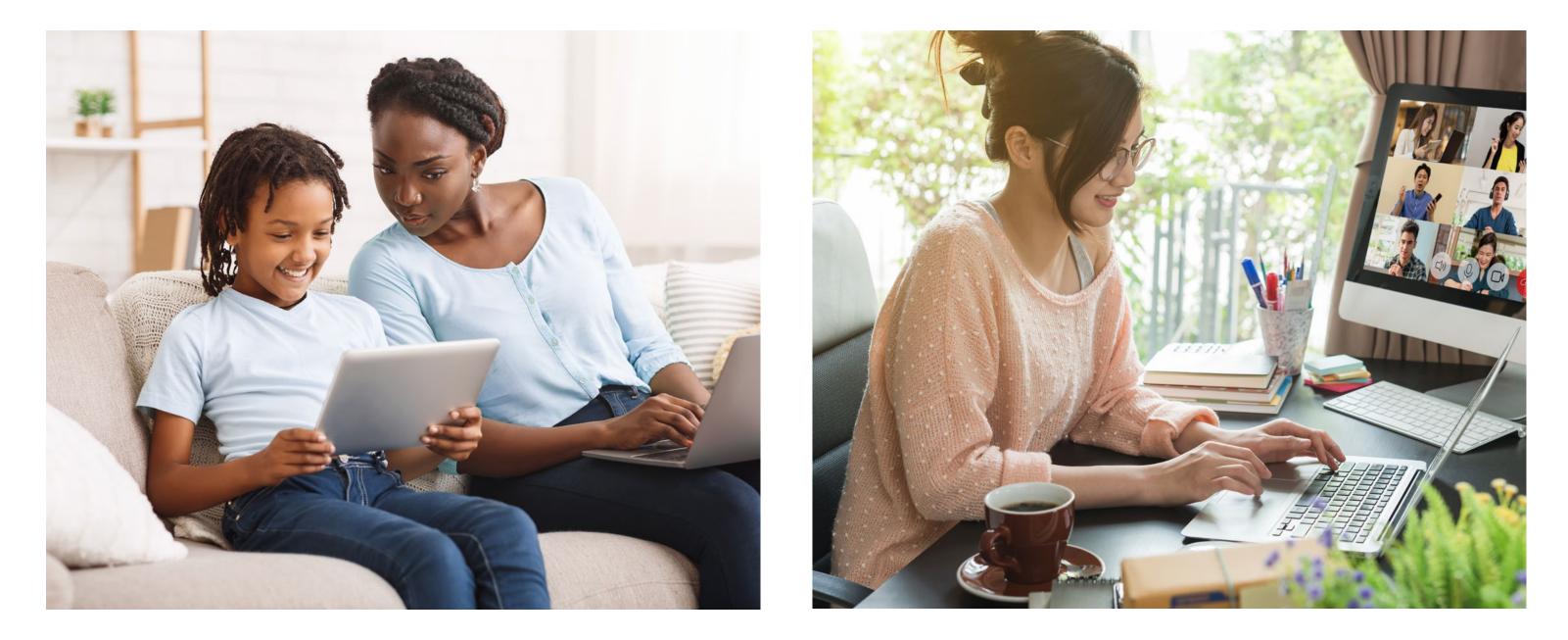
- Higher take rates, stickier services, and lower churn •
- Higher ARPU and increased customer lifetime value (CLV) •
- Increased satisfaction reflected in higher NPS
- More efficient sales and marketing, including lower acquisition cost

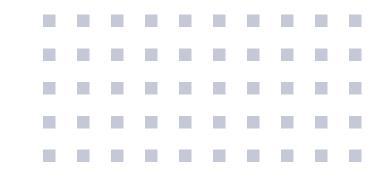




### **Develop Subscriber-First Solutions**

Historically, service providers have structured offers in a tiered model, with incremental increases in speed and price. The traditional approach ignores the actual needs of subscribers who don't think of themselves as 50 Mbps or a Gig. People identify with how their network supports their everyday lives. They see themselves as parents who want to keep their kids safe. Or work-fromhome professionals focused on maximizing productivity. Or gamers looking to crush the competition without worrying about latency or jitter. And they want







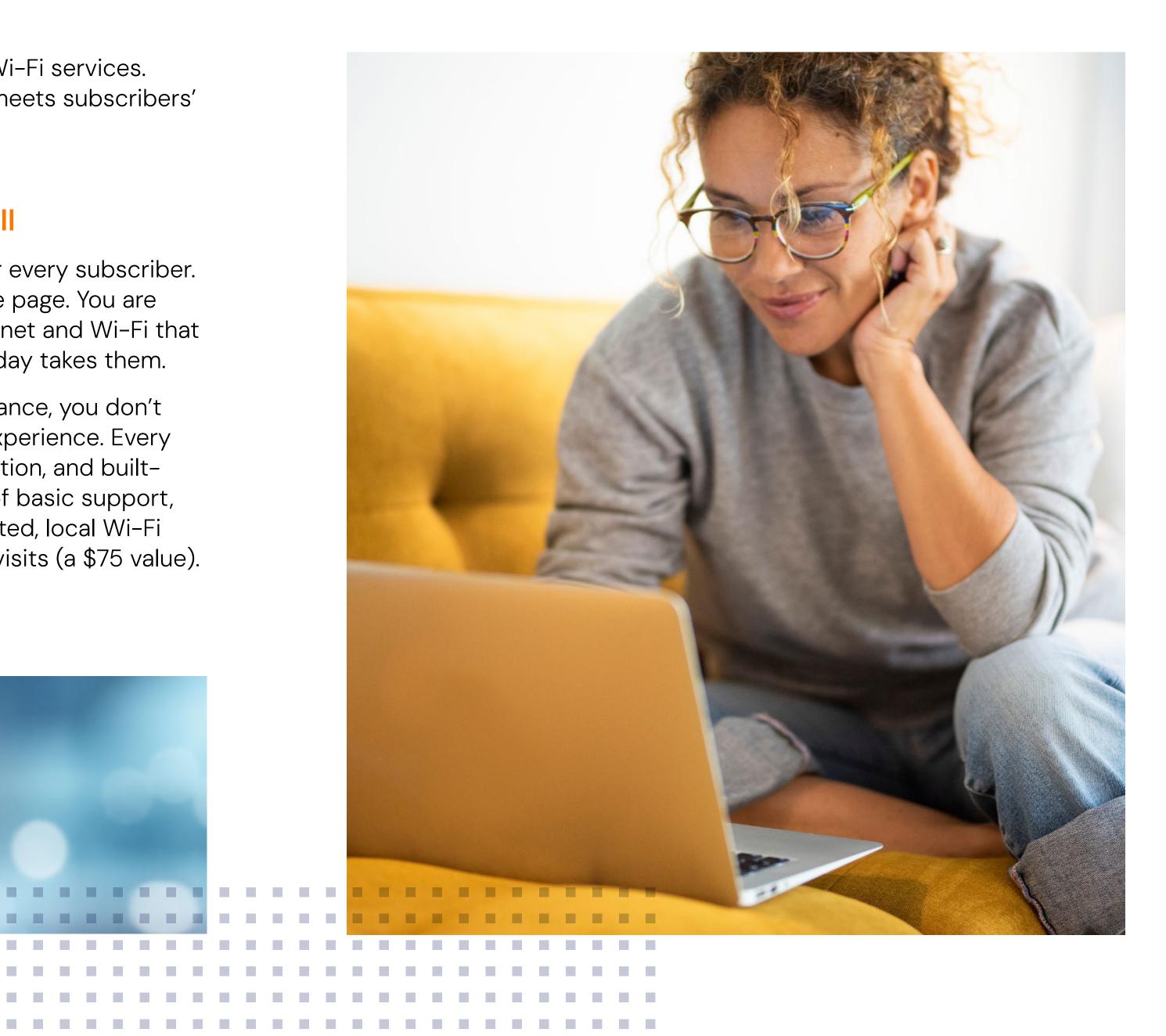
You already have the building blocks in place with managed Wi-Fi services. Now, you can develop a differentiated offering strategy that meets subscribers' varying needs and conveys the value you deliver.

### 1. Create an Exceptional Wi-Fi Experience for All

Start by providing an exceptional, foundational experience for every subscriber. Elevate your offers to the centerpiece of your website's home page. You are setting the standard in connectivity with secure, reliable internet and Wi-Fi that seamlessly integrates into subscribers' lives—wherever their day takes them.

Make every aspect of the experience a differentiator. For instance, you don't just provide managed Wi-Fi—you offer the "Ultimate Wi-Fi" experience. Every subscriber gets a mobile app for self-service and personalization, and builtin cybersecurity to ensure a safe online experience. Instead of basic support, you offer "concierge service and support," including a dedicated, local Wi-Fi specialist on call, unlimited support via chat, and free onsite visits (a \$75 value).



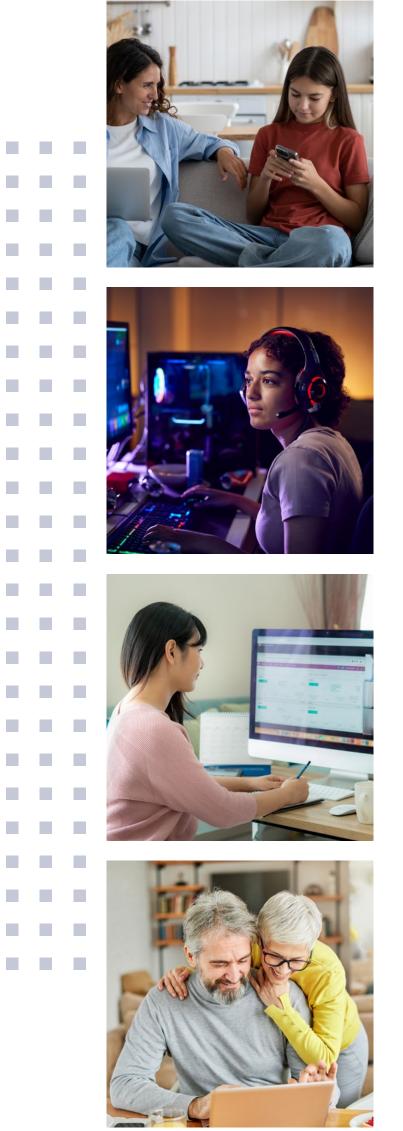


### 2. Tailor the Experience With Persona-Based Offerings

The next step is to implement a persona-based approach, tailoring plans to the unique needs of different subscriber groups. Families, professionals working from home, gamers and streamers, technology early adopters, young starter couples, and retired empty nesters are among the most common personas, accounting for approximately 80 percent of BSPs' subscriber bases.

Every successful persona-based offering strategy starts with a deep understanding of your subscribers and prospects. Data and subscriber insights can help develop offers and craft messages that align with subscribers' unique needs. It starts with demographic data, including the number of households in a service area, household composition, average income, age range, education, and occupation. You can dive deeper with psychographic insights—what motivates subscribers, the brands they associate with, the cars they drive, the music they listen to, and even the sports they enjoy. With the right insights, you can build a detailed view of who your subscribers are and what's important to them.

With the right data, you can develop plans addressing every subscriber's unique requirements.



For example, the "Guardian" plan is designed for families who want to ensure a safe online experience for their children. It builds on the standard Wi-Fi experience and gives parents tools to help them enforce online rules, combat cyberbullying, and secure their homes. The key is to align the offer with your subscribers' needs—using high-level messaging like cybersecurity (rather than specific product names) to convey the benefits without overwhelming the subscriber with technical details. connectivity and gaming traffic as part of their Wi-Fi those working from home, emphasizing productivity starter couples requires a more minimalist approach.

For gamers, you can introduce a "Pro Gamer" plan, highlighting features like hyper-responsive experience.

A "Home Office Hero" package can be tailored for enhancements, work device prioritization, and premium managed Wi-Fi. Again, you are simply repositioning your existing products—your Ultimate Wi-Fi package—to align with their specific needs.

Developing packages for empty nesters or young The key is to position your services as cost sensitive without detracting from value. Your more budgetconscious subscribers can still receive the fullfeatured, reliable experience they deserve, without hidden fees or surprises.

### The Guardian Plan

## Provide them with all the advantages while keeping them protected

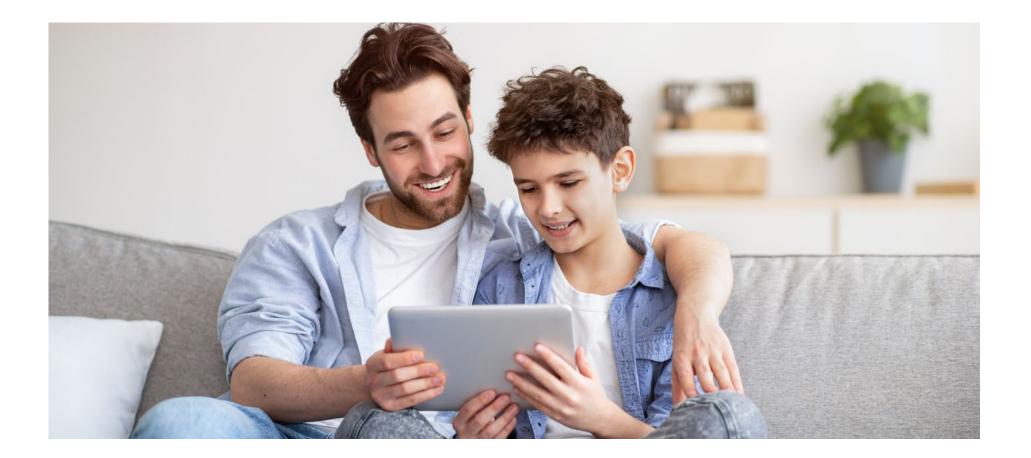




Built-in content controls limits app usage and site access Social media monitoring to detect cyber bullying and oversharing



Ongoing support from our family of Wi-Fi experts



### The Essential Plan

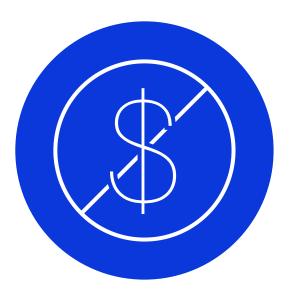
### For the minimalist



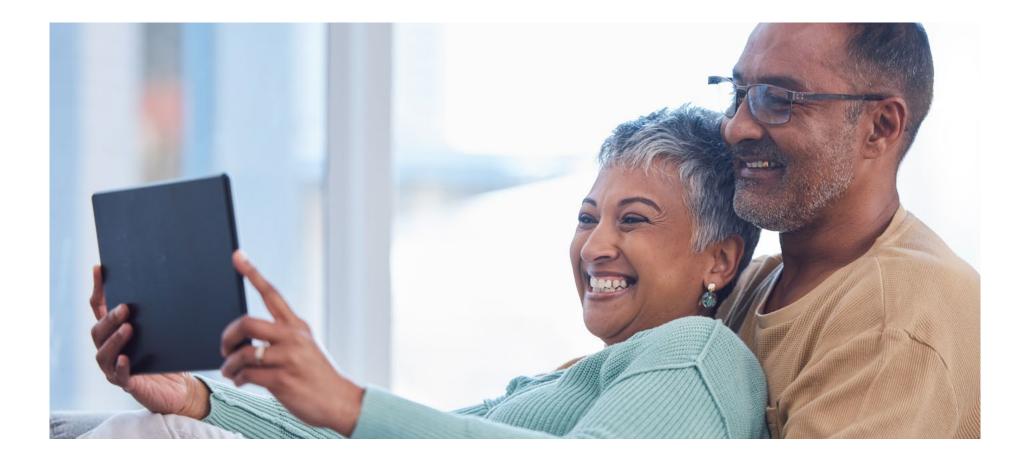
No catches, no hidden fees, no tricks.



Complete broadband and managed Wi-Fi service



No hardware cost or installation fees



### 3. Create Cohesive, Targeted Marketing Campaigns

Marketing plays a critical role in bringing your differentiated offering strategy to life. Just as your offers address the needs of specific subscriber groups, you can tailor your messaging and campaigns to the priorities and preferences of each persona.

Data and insights can help develop personalized messaging and build more individualized subscriber relationships. Even when undertaking an omnichannel campaign, data should inform the specific channels you use with each audience. The young starter couples in your subscriber base could respond most favorably to ads on social media, while the retired empty nesters may still prefer direct mail.

Consistency is paramount in executing a differentiated offering strategy. All elements in your marketing campaign—social media, email, print



### **PERSONALIZED OFFERINGS PROPEL HIGHLINE TO 95 PERCENT CSAT RATING**

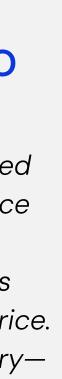
Forward-thinking BSP Highline has leveraged insights on their subscribers to develop a differentiated offering strategy to enhance the subscriber experience, drive ARPU growth, and increase satisfaction. Backed by their Ultimate Wi-Fi Experience, Highline grew their subscriber base by 56 percent in 2022. Building on this, the following year, Highline launched personalized service offerings like "Gaming," "Streaming," and "Working" Warrior." Six months after going to market with these personalized service offerings, Highline had increased ARPU by 15 percent. And their subscriber satisfaction is reaching new heights—Highline grew their CSAT rating to 95 percent, up from 93 in 2022.

. materials, and web landing pages—should align to create a cohesive message and experience for subscribers. If a subscriber is served an ad on social media, they should see the same messaging and information when they click through to the offer on your website. By presenting a unified front, you can effectively communicate your commitment to understanding and meeting the diverse needs of your subscriber base.



### DIRECTLINK EXTENDS EXCEPTIONAL SUBSCRIBER EXPERIENCE TO **SMALL BUSINESSES**

With hundreds of small and medium businesses (SMBs) in their service area, Oregon-based cooperative DirectLink saw a huge opportunity to provide the same exceptional experience they already offer to residents. They were among the first to launch Calix SmartBiz™, a productivity solution purpose-built for SMBs. With their OMNI Pro service, DirectLink gives business subscribers all SmartBiz capabilities along with broadband service for a single price. Local businesses—restaurants, mechanics, law offices, nurseries, electricians, even a winery can take advantage of the features that work best for them. Response to the new offering has been phenomenal: DirectLink met their three-month adoption target within three weeks of launching the service. And in just four months, they had signed on more than 100 SMB customers, positioning them to achieve their 2024 goals well ahead of plan.

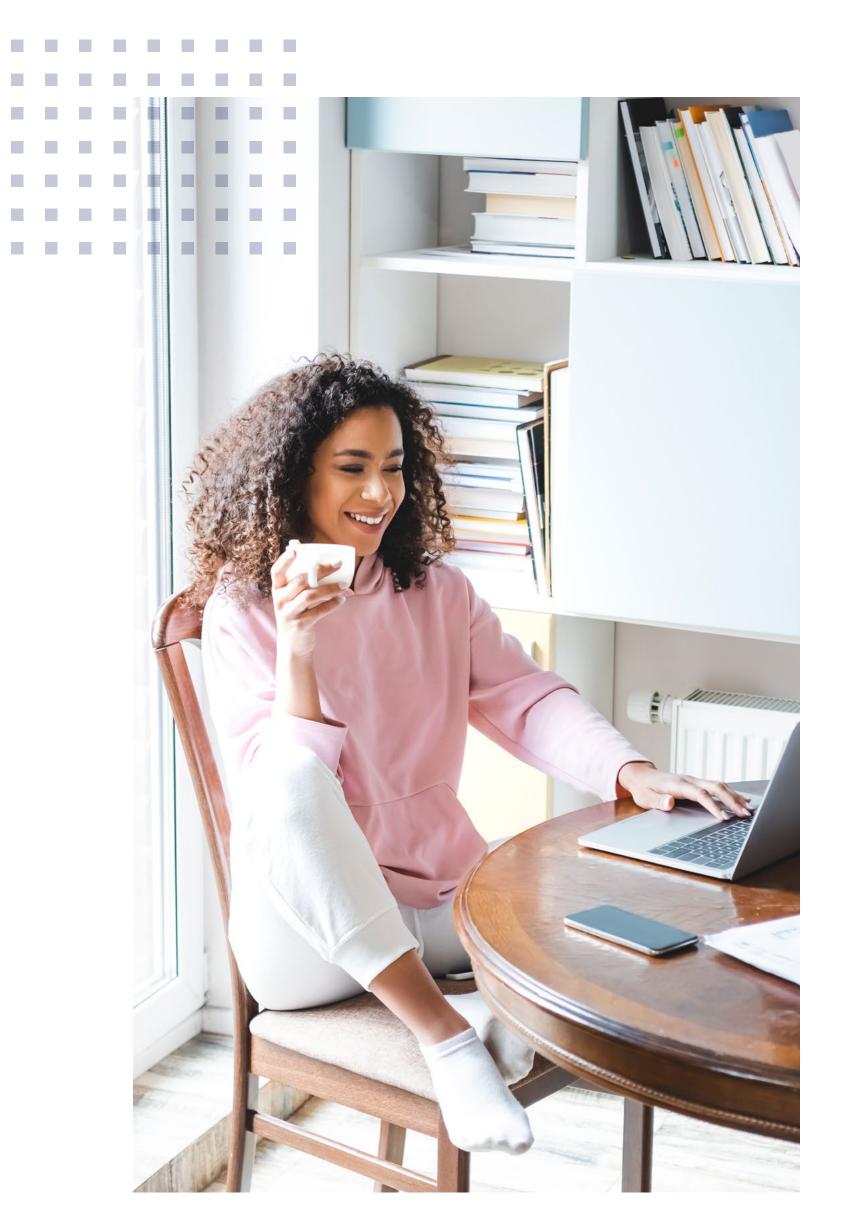


# **Driving Higher Levels of Engagement**

When considering subscriber experience, marketers should dispel the notion of pushy marketing strategies. Luckily, BSPs rooted in community don't need forceful sales tactics. Instead, they can use the data to engage subscribers, building touchpoints based on value and communication.

Engagement involves understanding a subscriber's needs and desires, developing personalized offerings, and fostering relationships that create enduring loyalty. This is where smaller BSPs can truly shine. As noted previously, these BSPs are passionate about their communities. Unlike Tier 1 service providers, rural BSPs are local businesses with strong ties to their communities. Subscribers are not an account number; they're friends, family, and neighbors.





### The Impact of Engagement on Success Metrics

In today's fiercely competitive broadband landscape, subscriber engagement is a critical success factor. Engaged subscribers are invaluable assets for businesses across several dimensions:

**Higher subscriber happiness and satisfaction:** Bolstering engagement leads to heightened happiness and satisfaction among subscribers. Positive experiences increase loyalty and satisfaction and even allow businesses to command a price premium.

Long-term subscriber loyalty: Engaged subscribers are likelier to develop loyalty, leading to enduring customer relationships. This loyalty translates into repeated purchases and advocacy, contributing significantly to your brand's growth and stability.

Lower subscriber churn: Effective engagement plays a crucial role in reducing subscriber churn rates. Engaged subscribers are less likely to abandon your brand, as they derive value and satisfaction from their interactions with you.

**Increased ARPU and CLV:** Better engagement positively impacts ARPU and CLV. Engaged customers are more receptive to upsells and cross-sells, contributing to higher revenue and extended customer relationships.

**Greater profitability:** Engagement is pivotal in boosting a company's profitability. Retaining subscribers is a cost-effective approach, leading to substantial financial gains.

New subscriber referrals: Engaged subscribers are likelier to become brand advocates, driving word-of-mouth marketing and bringing in new customers with lower acquisition costs.

**Expanded business opportunities:** Satisfied subscribers may choose the same provider for business services, unlocking additional revenue streams for the company.

### **Developing a Winning Engagement Strategy: A Three-Step Guide**

Engaging subscribers goes beyond one-off marketing tactics; it requires a well-crafted and comprehensive strategy. Building lasting connections with subscribers is essential for long-term success and customer loyalty. Here are three crucial steps to develop a winning engagement strategy that caters to your subscribers' unique needs and preferences.

### 1. Gain a deep understanding of subscribers.

Employ a data-driven approach to anticipate subscribers' wants and needs, tailor offers for different segments, and personalize interactions. Understanding subscribers on a personal level is crucial for fostering stronger connections.

### 2. Map the subscriber journey.

A comprehensive engagement strategy involves mapping the entire subscriber journey. This ensures that every opportunity for meaningful interaction is noticed. Marketers can plan touchpoints effectively, personalize messaging, and identify cross-sell and upsell opportunities.

### 3. Maximize engagement with the right platforms and tools.

Leveraging advanced subscriber engagement platforms, email marketing, social media, customizable mobile apps, and even direct mail can play a crucial role. Selecting the right tools while understanding subscribers' communication preferences is vital for successful engagement.

Subscriber engagement transcends mere marketing strategies and transactional interactions. It centers on understanding, delighting, and connecting with subscribers. By emphasizing authentic engagement, you can cultivate a loyal subscriber base and contribute to growth and success.

### C 🔒 mail

Inbox

/ Compose

Starred ☆ Snoozed

Sent

Be a Home Office Hero with enterprise-level perforn

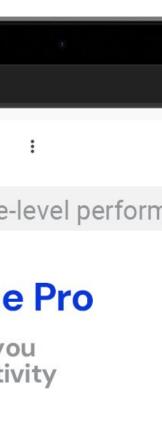
### For the Work-From-Home Pro

You're a pro and you need internet you can count on to power your productivity and collaboration.



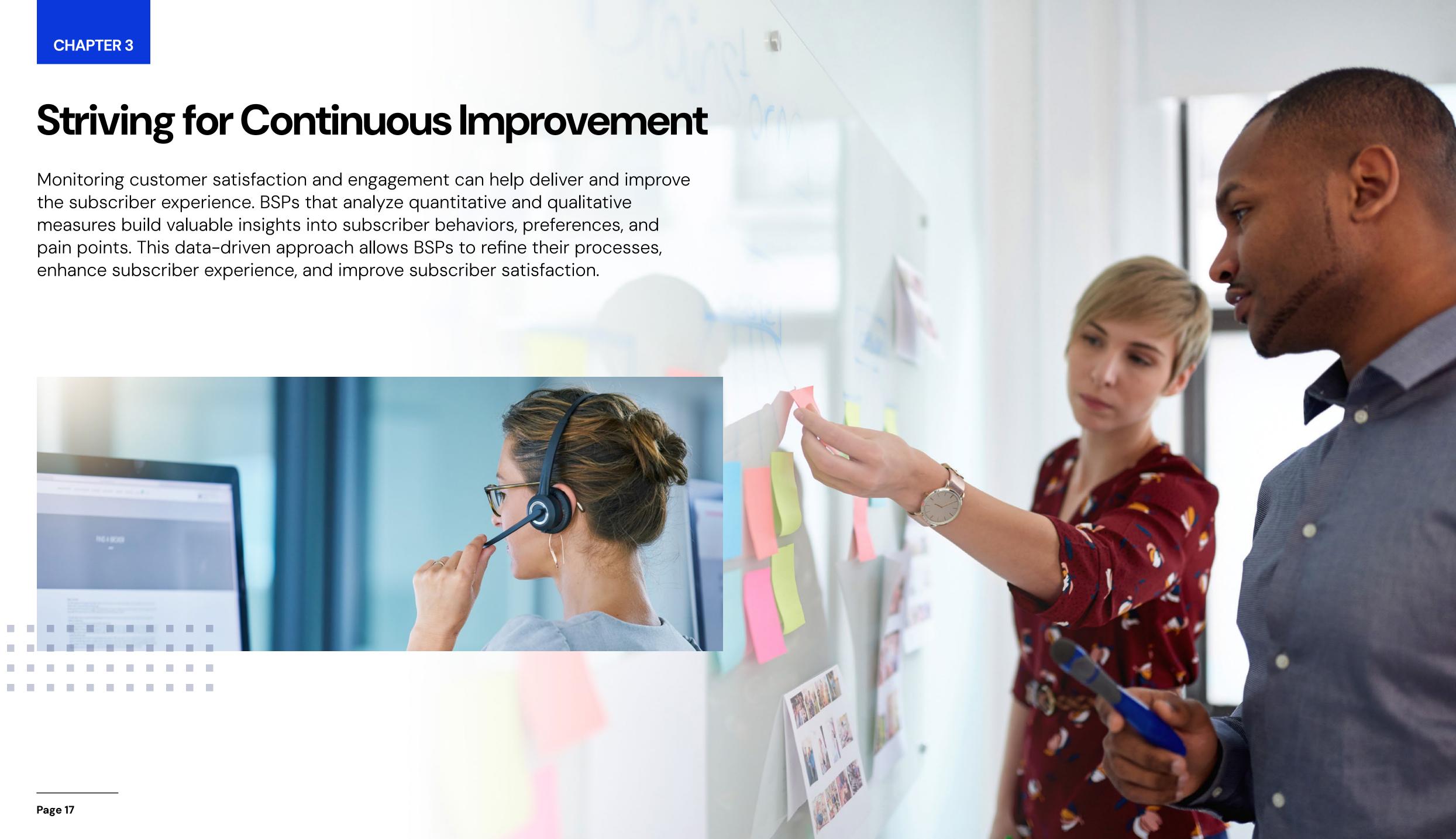
A Home Office Hero package can be tailored for those working from home, emphasizing productivity enhancements, work device prioritization, and premium managed Wi-Fi. Again, you are simply repositioning your existing productsyour Ultimate Wi-Fi package—to align with their specific needs.

HomeOffice Q









Here, we examine some of the most common measures of engagement, satisfaction, and loyalty.

Net Promoter Score or Customer Satisfaction Ratings	NPS and CSAT ratings provide valuable insights i loyalty. NPS gauges the likelihood of customers r others, while CSAT measures customer satisfact services. High NPS or CSAT scores indicate stror customer experience.
Subscriber Churn Rates	Churn rates represent the percentage of subscric cancel their subscriptions over a specific period. issues with engagement, customer satisfaction, o
Customer Lifetime Value	Customer lifetime value estimates the total rever a single customer over their entire relationship. E can identify their most valuable customers and t retain and nurture them.
Referral Rates	Referral rates reflect the number of new custom referrals. High referral rates indicate strong enga as satisfied subscribers are more likely to recom
Customer Reviews and Social Media Comments	Monitoring subscriber reviews and social media of feedback on customer sentiment. Positive review engagement and satisfaction, while negative one

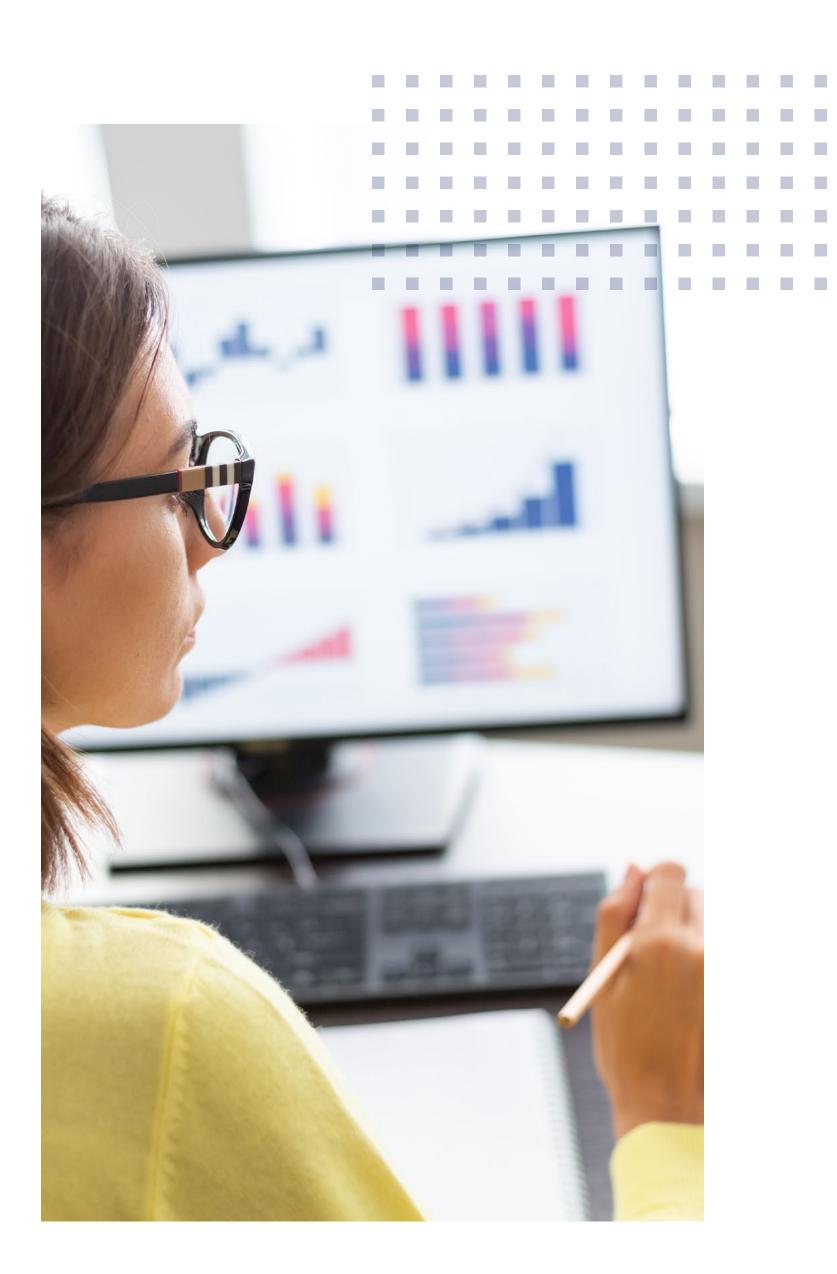
into customer satisfaction and recommending a company to tion with specific products or ong engagement and a positive

ribers who stop using a service or d. High churn rates signal potential or the value the company delivers.

enue a company can expect from By understanding CLV, businesses I tailor engagement strategies to

ners acquired through customer agement and customer advocacy, mmend a company to others.

o comments provides real-time ws and comments indicate high es highlight areas for improvement.



### **Using Data To Improve Experience**

Tracking satisfaction metrics is the first step. Here are five ways BSP marketers can harness data to create a virtuous cycle of increased engagement, customer satisfaction, and long-term brand loyalty.

### Map NPS measurements to subscriber experience data.

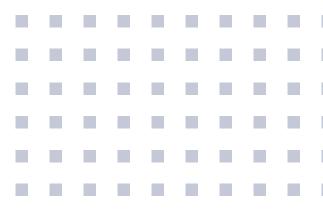
By comparing NPS and subscriber experience data, you can better understand You can acknowledge and reward long-standing subscribers by introducing a how satisfaction and loyalty may vary across specific subscriber segments. You loyalty program. Such plans incentivize continued engagement and encourage customers to stay loyal to the brand. Loyalty club participants are 50 percent can expand on the numbers by researching trends based on service tier, tenure of service, subscriber personas, and number of managed services. From there, more likely to recommend their favorite brands to friends and family. you can develop targeted strategies to address concerns and enhance the 5. Create a formal customer referral program. subscriber experience.

### 2. Pay attention to qualitative comments in satisfaction surveys.

A structured referral program motivates subscribers to refer friends and family, driving new subscriber acquisition. Rewarding both the referrer and the new Qualitative comments provide rich insights into subscriber experiences and subscriber fosters a sense of community and further enhances engagement. pain points. Unpacking these comments can help you identify specific areas for Referral programs offer significant benefits—customers who refer others have a improvement, such as introducing new service bundles or establishing a loyalty 37 percent higher retention rate, and referred customers are four times more likely to refer their friends. program.

### 3. Respond to feedback on social media and reviews.

Engaging with subscribers who leave reviews or comments on social media platforms demonstrates a commitment to satisfaction. Responding to positive and negative feedback shows that your company values subscribers' opinions. But it's particularly important to address critical reviews: An estimated 62 percent of people share their negative experiences with others.



### 4. Develop a customer loyalty program.





Tracking engagement and satisfaction is vital for BSPs to foster long-term relationships with subscribers. You can continuously refine your strategies and optimize engagement efforts by monitoring key metrics. You can also enhance the subscriber experience, build a loyal subscriber base, and drive sustained growth and success through personalized and responsive engagement.



### TOMBIGBEE FIBER PRIORITIZED COMMUNITY NEEDS— AND ACHIEVED A +91 NPS

Tombigbee Fiber takes advantage of managed services to deliver world-class broadband experiences in small-town Mississippi. They started by offering network-level cybersecurity and advanced network controls for the home, adding social media monitoring to protect children from online dangers like cyberbullying and child predation. Tombigbee now provides community-wide Wi-Fi to connect their customers, students, educators, football fans, and first responders when they need it most. Their strategy of prioritizing community needs helped grow their business by establishing them as a trusted local technology leader—as proven by their exceptional +91 NPS.





BSP marketers focus on winning the hearts and minds of subscribers—as well as their wallets. You know that competing on speed or price alone is no longer enough. You will prevail by providing an exceptional subscriber experience.

By embracing a differentiated offering strategy, you show you care about subscribers and can improve their lives like no other BSP can. By engaging subscribers—not pushing products—you establish deeper relationships that lead to long-term loyalty. And by monitoring key measures of engagement, you can refine and enhance the experience, increasing satisfaction and winning subscribers for life.

<u>Learn how</u> Calix SmartLife creates amazing experiences for every subscriber.



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