



Quickie Customer Experience for Tech Comm

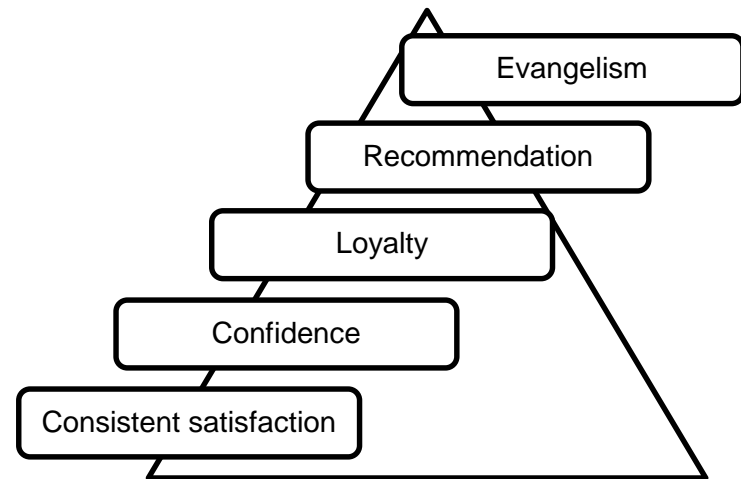
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Quickie definition

What your customers think about your company considering all of their interactions with it.

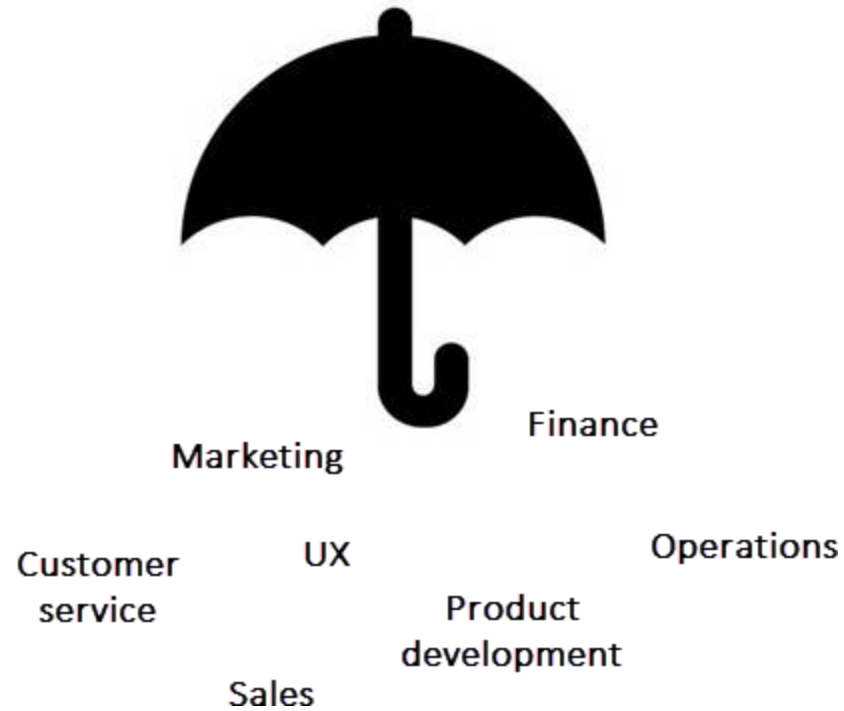
People
Processes
Artifacts

Goals



adapted from Shep Hyken

CX is not UX



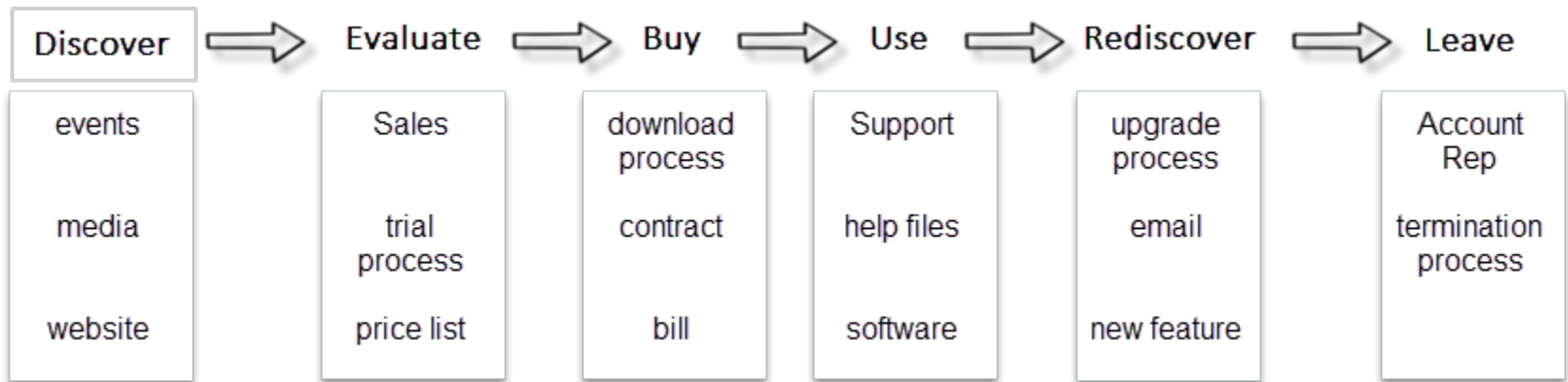
Quickie process

1. Map the **customer journey**
2. Identify **interaction points**
3. Identify **pain points**
4. Create **listening posts**

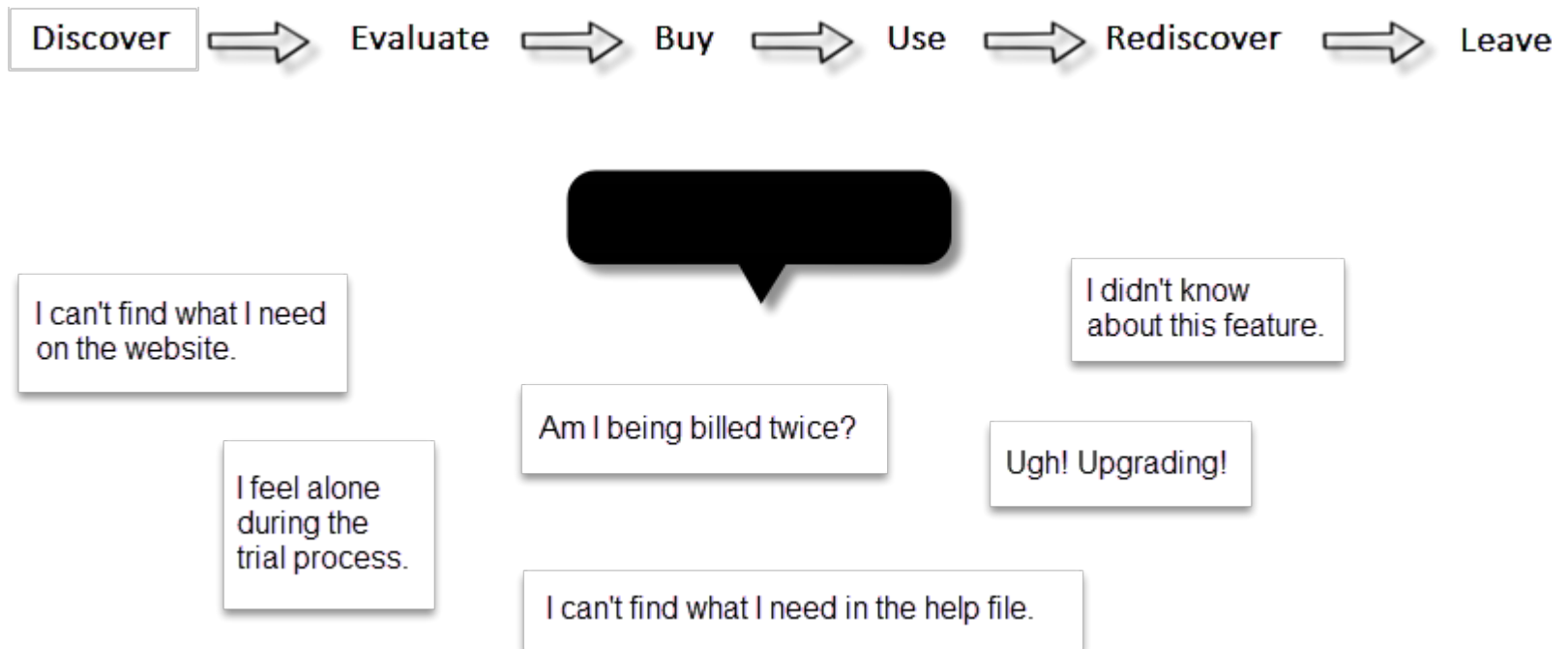
1. Map customer journey



2. Identify interaction points



3. Identify pain points



4. Create listening posts

- Feedback button on website
- End-of-trial call from manager
- Survey
- Alpha and beta testing program
- Customer council
- Social media

Know where you are in the journey



Increase interaction: existing tech comm

- **Discover:** Use tech comm products at trade shows and events
- **Evaluate:** Offer quick reference guide as sales tool

CQG Spreader Quick Reference Guide

Creating a Spread QFormula ›

Spread formula components

Spread formula = SPREAD (<CQG expression>, <calculation mode>, <tick size>, <trade ratio>, <BAT filter>, <rollover>, <rounding mode>)

• **CQG expression:** Symbols and multipliers for spread.

• **Calculation mode:** How spread is calculated, by legs or currency.

L1, L2, L3, etc. = price based on tick value of leg selected

CUR = price based on full currency values of legs

• **Tick size:** Spread tick size in binary or decimal.

1/2, 1/4, 1/8, 1/16, 1/32, 1/64, 1/128, 1/256, 1/512, 1/1024, 1/2048, 1/2 1/64, 1/8 1/32, 1/4 1/32, 1/2 1/32

CUR = tick size is greatest common denominator (GCD) of leg tick values or minimum tick value if GCD is not applicable

• **Trading ratio:** Order quantity for each leg in this format: leg1:leg2:leg3. Can be fractional.

• **BAT filter:** Leg bid/ask and trade filter. Separate filter for each leg with a colon, BA:T.

BA = for buy leg, leg ask price is used for spread ask price calculation and leg bid price is used for spread bid price calculation and vice versa

for sell legs

T = trades are used for both synthetic spread ask and bid prices calculation

B = leg ask/bid price is used for spread ask/bid price calculation

• **Rollover:** If turned on, when one leg expires, all legs roll over to same month.

0 = same month rollover is turned off

1 = same month rollover is turned on

• **Rounding:** Rounding for fractional lots resulting from fractional trade ratios in complex strategies.

DOWN = always round down

UP = always round up

MATH = round up when fractional part is 5 or greater; round down when fractional part is less than 5

Find additional details at help.cqg.com.

Setting Trading Parameters ›

Messaging Parameters

These parameters help mitigate messaging:

▼ Messaging	
Min Size Increment	1
Lots	⊕
%	○
▼ Active Price Range	
Price Range for Working Orders	Default
Order Action outside active range	
Default	⊕
Cancel working leg	○
Work leg, periodically update	○
Work leg, periodically update, and actively move away from MKT	○
Min Price Change	Default
Periodic Force Update	Default

- **Min Size Increment:** Working order modified only if quantity available in monitored leg increases by at least this amount. Working order size is always modified down on a decrease when the available quantity on the monitored market decreases.
- **Active Price Range:** Range (from best bid/best offer, whichever is closest) where orders are actively worked.
Range Size: Price increments from best bid/best offer where orders will be worked or modified.
Order Action outside active range: How system handles working legs that are far from best bid/best ask. A working leg order is considered far from best bid/ask by number of price increments specified in Active Price Range.
Default = do not override server settings.
Cancel working leg = cancels leg immediately if outside range.
Work leg, periodically update = keep order wherever it is and move it only when time comes for a periodic update (set in Periodic Force Update field).
Work leg, periodically update, and actively move away from MKT = keep order wherever it is, but move order away from the market every time it should be adjusted away, and periodically update it closer to best bid/ask when necessary.
- **Min Price Change:** Working leg order price update in price increments/ticks. System ignores any price changes smaller than this value.
- **Periodic Force Update:** Period of updates to the working leg order in seconds, such that every n seconds, the leg is put where it ought to be placed based upon current prices.

Increase interaction: new tech comm

- **Evaluate:** Write for the situation, e.g. Michael Hughes, writing for trials
- **Use:** Create additional education materials

Reading Strategy Expressions

Each strategy expression consists of the [underlying contract](#), the [strategy identifier](#), the [strategy leg gap](#), the [front month](#), and the [year](#). Examples:

Strategy	Instrument and Scope
EDAB2U6	Eurodollar 2-year bundle U6 - Z6 - H7 - M7 - U7 - Z7 - H8 - M8
KEZWH1Z4	Wheat 1-month offset expiration inter-exchange spread (IES) KEZ4 - ZWH5
CHGI1Z4	Cattle/Lean Hogs 1-month offset expiration intercommodity spread (ICS) LEZ4 - HEG5
QPQOU4	ICE gas oil futures 4:3 crack U4 - U4
Y117I2U5	AU 3-year bond/90-day bank accept bill 17:20 lagged intercommodity spread/special strategy U5 - H6
TYAR1U4	US 10-year treasury note reduced tick calendar spread U4 - Z4
GDCT6N4	Milk Class III strip N4 - Q4 - U4 - V4 - X4 - Z4
NOBU5	NOB (10-year–30-year) treasury intercommodity spread U5 - U5

- **Rediscover:** Create hybrid release notes

Order Desk

Enter the market immediately without having to circumvent market data components typically found on a fully integrated monitoring and trading application. There are times you want to enter the market as quickly as possible, no matter where that market is at the time. Order Desk allows you to do just that. Order Desk is a streamlined order entry window divested of its market-monitoring garb.

Note, though, that the market data component doesn't have to be abandoned. Link Order Desk to any of CQG's market monitoring tools for the same benefits of integration. Order Desk provides flexibility to those traders who prefer to use separate applications for market monitoring and order placement.

Offer your services to others

- Assist with crisis messaging
- Create email templates for support
- Teach: error message writing tutorial for developers
- Contribute to internal and external product training
- Make suggestions for improving the company's products
- Find other channels for your work (newsletter, blog)
- Volunteer for interdepartmental teams

Quickie resolution: tech comm pain points

- Clutter
- Confusion
- Discoverability
- Information gaps
- Navigation
- Performance support
- Relevance
- Search
- Usability
- Writing quality

Help others with pain points

Sales & Account Management

- Customer feels alone during trial process
- Customer is confused about enablements, pricing, exchange approval process

Finance

- Customer does not understand agreement instructions
- Customer is confused by bill

Marketing

- Customer has trouble finding demos or how-to information on website

Help others with pain points

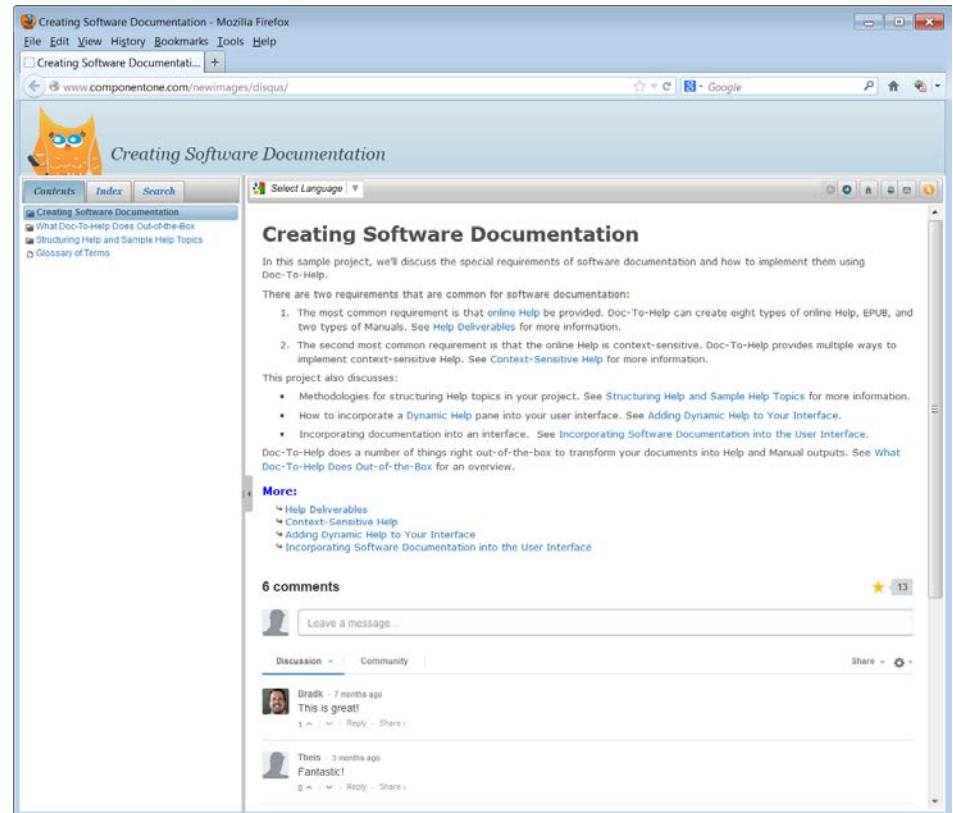
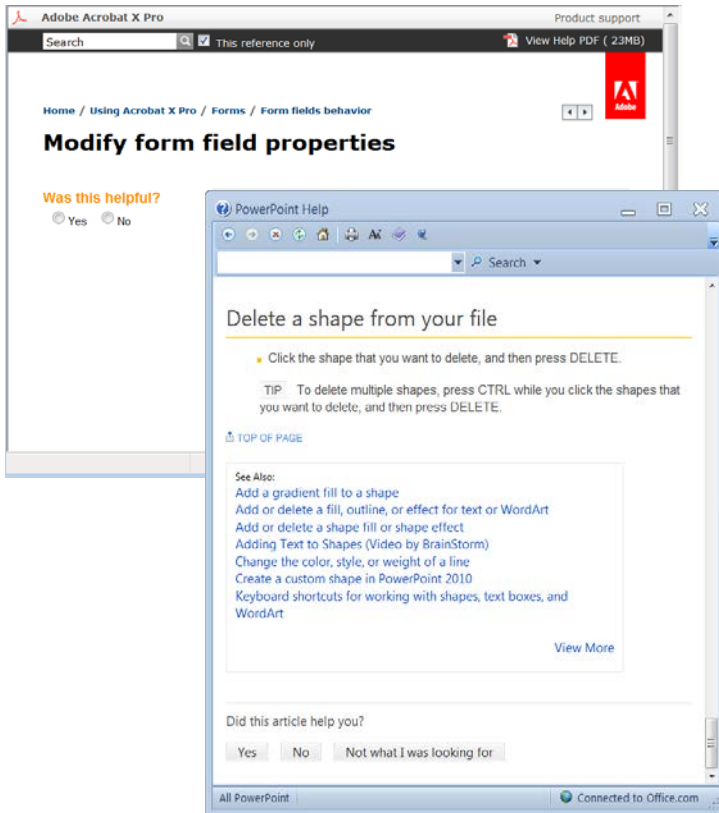
Product Development

- Customer doesn't know optimization information
- Customer has problems with 64-bit installation
- Customer has installation issues because of conflict with another .exe file in the directory

Support

- Customer has to wait for response because employees don't know who advanced support experts are
- Customer doesn't know what's new in upgraded software
- Customer receives out-of-date documentation

Tech comm listening posts



see <https://disqus.com/>

Quickie customer data

- Social media
- Online search, even if you're small
- Any colleague who works directly with customers
- Internal support ticket software
- Company distribution lists

CX is good for tech comm

- Emphasizes customer, not company or department
- Expands scope of what qualifies as tech comm work
- Provides opportunity to use problem-solving skills, creativity, and other hidden talents as well as expert communication skills
- Strengthens professional relationships and offers occasions for internal networking through participation on cross-functional, interdepartmental teams
- Helps you achieve better visibility and value within the company



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