

# Cleaning Service Healthcare Customer Assessment



Nationally branded cleaning service provider assesses market growth opportunities across two healthcare subsegments

## Background and Objectives

A national residential cleaning franchise is exploring adjacent market opportunities for commercial cleaning services in healthcare settings. The client asked BCE to evaluate market opportunities in two segments of the healthcare industry. BCE's client needed to understand each segments' perceptions about using third party cleaning services, the key decision makers, and the decision-making process for hiring third party cleaning services. To win new business, the client also needed to understand what differentiators it could leverage to distinguish itself in a highly commoditized market.

## Approach

BCE began with secondary research to identify key customers across two key segments and competitors in the healthcare cleaning services space. Then, BCE conducted primary research interviews with healthcare company leadership to understand the decision-making process and key decision makers driving hiring of third party cleaning services. The interviews also explored customers' unmet needs, evaluation criteria for existing services providers, and current competitors. Competitor research was segmented into local, regional, and national competitors serving the two healthcare segments. Interviews with competitors provided insight into existing business models, key differentiators, and overall growth of the opportunity in each market.

The first layer of analysis examined willingness to outsource cleaning services across the subsegments. Then, BCE compared willingness to outsource against fragmentation in each market. Our research provided customer case studies and competitor profiles to illustrate unmet customer needs, perceptions of third party cleaning service providers, and evaluation criteria for current cleaning service providers.

## Recommendations

BCE identified the most attractive healthcare segments given the client's business model and each segments' willingness to outsource. Additionally, BCE provided recommendations for driving cleaning services differentiation in a fragmented, commoditized market. These recommendations were ranked from least actionable to most actionable as well as lowest to highest impact providing our client with a clear roadmap for winning new business.

