DELIVER A 'SWEET' CUSTOMER EXPERIENCE
VIA YOUR CRM

By Brian Wolstenholme

WHAT'S NOT WORKING?

We all realise that customers, and their satisfaction, practically determines a company's success. But did you know that your company could be *missing vital sales* by not integrating your CRM with social media, company emails, and web chat agents?

Here are some clues that your present 'Customer Relationship Management' system (whatever that may entail) is not working:

➢ Efforts to retain regular clientele / customers are largely not working.

➢ Difficulty implementing cross-selling and upselling to existing customers.

➢ An inkling that customer satisfaction and advocacy / customer promotion is low.

➢ Promotions go out, but the sales team is not utilising the social media and website interactions you have.

➢ Employees are complaining that your systems are hard to use, or are taking too long for everyday follow-up routines.

➢ Simply reconciling what customers spent on average takes forever.

➢ Customers are interacting more via digital or mobile apps, but the sales & marketing team is not responding to this fact.

➢ Concern that new, dynamic competitors are offering customers a faster/easier service.

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Customer Experience is probably not what you think it is. CX includes not just customer purchases, customer agent communications and service requests, but also social media interactions. So it goes well beyond the customer service team.

To hit the 'sweet spot', focus must be on their experience at these touch points. Does their experience satisfy, annoy, or exceed expectations?

At the moment, you might view your CRM or contact list as part of your 'business operational tools'. But with automation and workflow processes in place, it can be much more than that. It can be your own secret weapon in selling... and servicing.

WHY A BETTER CRM MATTERS TO YOU

A database with customer details, like conversations, quotes, invoices, and emails under their 'customer card' is very handy when it comes to customer service. It's certainly better than trying to open a myriad of documents when the customer or client calls.

Sales processes too, can be streamlined with a good CRM, so that salespeople get assigned leads, see their opportunities and get reminders for calling their leads.

The result of this is better lead-to-customer conversions and swifter communication to new enquirers. (For lead responses greater than 2 hours, customer take-up drops off dramatically).

This is best practice Customer Relations Management, but we also want to look at the whole customer experience.

WHY DO 98% OF AUSTRALIAN BRANDS VALUE CUSTOMER EXPERIENCE?

First, let's define a customer experience system. A **Customer Experience Management** system focuses on marketing, collecting information from social media portals, customer interactions and all other touch points.

Analysis of all this helps Marketing to deliver more relevant offerings and it helps Management to discover key customer insights.

Three valuable benefits of implementing a Customer Experience Management system (carried out with an enterprise CRM) is that it:

- helps to increase loyalty to the brand
- increases company revenues, and
- decreases customer attrition.

These outcomes are why 98% of major Australian brands are dedicated to improving their customer experience (Forrester Customer Experience Index survey, 2015). However, only one-third of these have a customer experience strategy that's aligned with the overall company strategy.

In addition, some of these companies are fighting battles with reputation online, as customers disgruntled with service take to their own social media to complain.

The Forrester survey rated 58 brands on *effectiveness*, *ease of service*, and *emotion* (the feel good factor). Forrester found that Australian brands don't value *emotional leverage* as much as they perhaps should, as they focus on providing an *easy* or *effective* experience to customers.

So here's a gap for your company to fill. Imagine if your organisation can deliver all three aspects — customer satisfaction would go through the roof!

As a SME with a set budget, yet understanding the principles of Customer Experience Management, means that your CRM can be aligned to your overall business strategy.

A CRM is a great recipient of data. The manager who understands this data coming in then drives change. He/she then will come up with solutions for better customer satisfaction, more 'in touch' social media, and will work with their CRM Solutions Partner to get better dashboards and reports for increased company-wide understanding.

Intelligent automated business processes that action customer queries and complaints on the spot will help keep customer satisfaction to the satisfied and delighted end of the scale.

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If you're interested in exactly how CRM tools work, read on. If not, just skip this next section.

HOW ZOHO TOOLS CAN BE APPLIED

At Professional or above level, there is a function to manage social media interactions. You can capture leads from Facebook or Twitter. Being able to see previous conversations via the Zoho platform will allow your customer agent to see what's going on in Facebook without being on Facebook. They can also see who is visiting your linked website.

Did you know there is a full social media management platform inside Zoho Social? (Zoho's top package, CRM Plus, includes social management at a fraction of the price of other platforms, US$60 per user per month for the whole package, including CRM, social, web visitor tracking, email campaigns, surveys, projects and reports).

You can schedule your bulk social media posts in advance, which is handy to set up for special occassions and holidays that fall when employees are away. You can even collaborate on ideas for content with other colleagues that have Zoho access.

But how hard is it to learn?

At some levels, sales and marketing platforms take some time to learn how to use, but our clients find that Zoho's extra modules are among the easiest to use. Training on the more complex operations can be arranged.

## CATCH AND KISS:
HOW TO IMPROVE RESPONSE

Capturing and responding to email interest and social media questions quickly is the most critical first step in improving customer service. Many ASX100 companies are still not responding fast enough (or at all) to enquiries via Twitter. Only 19% of companies surveyed respond via Twitter ('*Social Media in Australian Retail' Report* by SR7, 2012).

These large companies were better with Facebook messages (68% responded), but how does your organisation do?

When your company ignores prospect enquiries or feedback via social media portals because there is no system to handle it, real dollars walk out the door. The same applies with website leads.

RESPONDING TO LEADS QUICKLY, AND WITH RELEVANCE, IS MADE EASIER WITH THE RIGHT TOOLS

Viewing visitors on your website in 'real time' with SalesIQ, customer agents can begin to understand what a web visitor might need, before any chat initiates. Then, when the chat window is activated, your agent's response can be appropriate to that visitor.
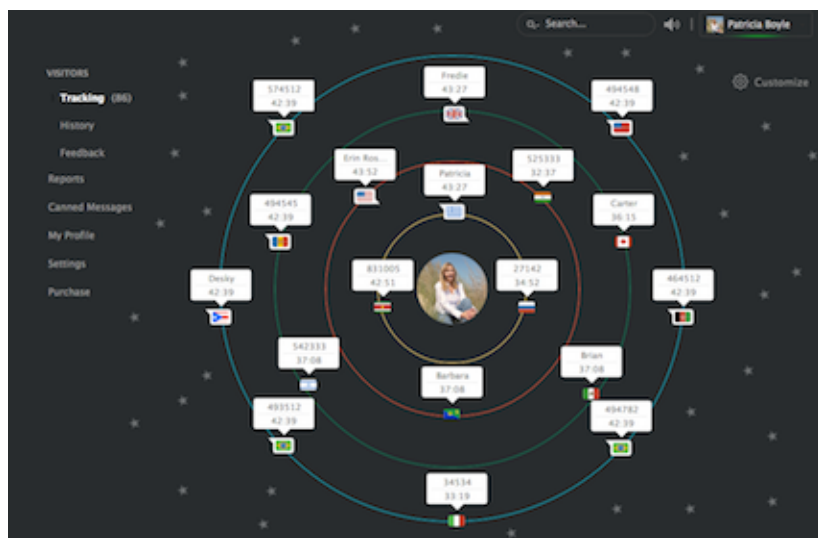
SalesIQ shows the pages the prospect has visited, which helps when first connecting and qualifying interest. (The system also seems friendly by showing an avatar of the customer representative).

The obvious advantage of this 'real time' response is that prospects are responded to when they have questions, *before* they go looking anywhere else for the answers.

HOW DO I MEASURE THE VALUE OF EACH CUSTOMER?

Do you want to work out your ROI & life-time customer spend? **Life-time customer value** is something that can be integrated into the dashboard by your CRM Solutions Partner. Normally managers can see the value of each customer on an annual or per project basis, but to get a 'lifetime value' necessitates a formula to be programmed.

Once you have this value, then it is easier to work back and determine the return on investment in marketing/sales.

Another programmable feature is Customer Points Value. This assigns a pre-set points value of a prospect, based on their interactions (more active versus less active). This will help the user of the CRM judge who to focus their calls or emails on.

THE DREAM OF SEAMLESS CUSTOMER SERVICE

Customer data has become easier to collect, but difficult to make work for the business.

Author Alan Trifler (who wrote 'Build for Change') espouses the theory that businesses must use technology in a sophisticated way (and listen/respond) 'or face customerpocalpyse'—i.e. death of the company due to the power of the consumer. He says CMOs (Chief Marketing Officers) must ensure that data is not just siloed inside an off-the-shelf SaaS.

Trifler says that an innovative approach, i.e. customising tools to the business, means that customer service (and even self-service) can work across the whole 'value chain'.

Because, ideally, the customer should receive a seamless experience, from first looking up the website, to calling the call centre, to receiving the goods/service, the technology must correspond and empower the marketers and decision-makers who are driving the business. (CMO.com.au http://www.cmo.com.au/article/557738/why-cmos-must-embrace-software-agility-risk-customerpocalyse/)

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Integration with email data is key to any customer experience program's success.

Integrating Zoho Campaigns helps Marketing to segment the lists and personalise emails as needed, due to the merge fields and data available in their quick-to-access CRM.

Email leads can be automatically captured with Web-to-Lead forms. In Zoho, the fields are easy enough to customise yourself, and have the website manager install it quickly.

The lead details then go straight into the CRM, and an alert fires off to let a Sales Agent know that a hot prospect is waiting for a call or email response.

A response is then entered or a call logged, details of which are forevermore in the system. A task is set for Sales. In time, the prospect becomes a customer and the Customer Service Agent can see details of where the lead came from, what the sales staff promised, and quotes or purchases associated with the account.

With this automation, you should be able to get your customer response times down to less than one hour – and implement prospect email autoresponders that make sense to the recipient.

WHAT HAVE WE LEARNED?

So, the major ways that better business processes and CRM implementation can help a business include:

- Understanding that customer data is not the end... instead using data and automation to deliver a better experience.

- Allocating information quickly to sales agents and customer support agents (the efficiency aspect).

- Assessing the effect of marketing activities visually, through a specific dashboard.

- Increasing sales by managing leads with greater speed and efficiency.

- Actioning customer queries and complaints on the spot, thus improving customer retention.

Overall, your CRM system should improve how you communicate with all customers.

A well-planned CRM strategy will also increase company productivity. This is in part due to more detailed customer data... but is also reliant on effective and engaged team members who understand that customer satisfaction is of top priority. Now that's 'sweet' customer experience.

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Just call us at **1300 362 918** for a free demonstration of Web-to-Lead contact forms.

Brian Wolstenholme

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I Want That CRM is a business process improvement consultancy, specialising in customising Customer Relationship Management for small to medium business. Brisbane based, with Australia-wide remote service.