

A Six-step Action Plan:

PUT “*RELATIONSHIP*” BACK IN CRM
TO ENSURE BUSINESS SUCCESS



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Forward by Dave Jackson

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with Clicktools



I can declare that the search for the secret formula for success in business is over. There isn't one!

There are however a number of commonplace practices used by companies that thrive. Perhaps the most important practice is to focus on customer relationships. Be willing to listen to, learn from, and act on behalf of customers – the true lifeblood of our businesses.

I'd like to share with you two interesting lessons from our experience at Clicktools that are pertinent to your efforts to foster business growth by focusing on customers.

Lesson one: listening to customers is good for business. We built our business on surveys, but over the years, customers began to use Clicktools to gather information at all stages of the customer journey through web forms, call scripts, and landing pages as well as surveys. Many of these innovative uses for Clicktools came from our customers, not us. Without their innovation and our willingness to listen and learn, Clicktools would be a significantly smaller business.

The second lesson is the importance of a single view of the customer. We have managed to this maxim from day one, as the first software company to offer point-and-click integration to integrate feedback with CRM. This "bet the business" decision to invest in CRM integration cost us our largest customer at that time, who wanted us to invest in other functionality. (Sidebar: we parted as friends).

In the end, the decision was worth this risk because having one location for all customer transaction and interaction data underpins the ability to deliver a great customer experience and to generate the insights that are only possible from integrated information.

This eBook offers an action plan to help you build a better business by focusing on your customers. It offers guidance on how you can leverage CRM to drive great customer experiences. Connecting the dots between your company and your customers is critical to the success of your business.

If you like our ideas and approach, tell your friends and colleagues. If you don't agree with what we have to say, please tell us. We have built links into the book to allow you to have your say. We are a listening and learning company after all! And if you think we can help you, give us a call.

Dave Jackson, CEO Clicktools

THE CONNECTED CUSTOMER FRAMEWORK

The term Customer Relationship Management (CRM) has been around for more than 30 years. It began as a business strategy for winning customers and building relationships with them. Of course, at that time, CRM had little to do with technology.

Years later, the concept was hijacked by software vendors and quickly became synonymous with sales force automation. Through the late 90s and early 2000s, today's big CRM players joined the game and the term, CRM, referred to a technology solution that supported the sales cycle, rather than a business process, supported by technology.

In practice, relationships were no longer at the center of CRM.

Recently, however, CRM software has expanded to embrace managing the customer relationship, returning closer to its roots. Major CRM systems now address much of the customer lifecycle, including marketing, sales, and support. Unfortunately, in many companies, CRM systems and processes are still fragmented and often approached from an internally driven perspective, rather than a customer relationship-driven one. This ultimately frustrates so many customers and internal users that entire CRM initiatives may be dismissed as failures.

"Buyers no longer want to hear your sales pitch; they want to know how you solve their specific problem or satisfy their needs and desires. The challenge has changed from driving a sales process to facilitating a buying process, a difference that is more than semantic."



READ BLOG POST

clicktools.com/blog

Let's get back to the roots of CRM

To embrace the true concept of CRM, some organizations need a shift in perspective, but it's not a logically challenging one. Simply think with the customer's mind. Then, you'll see that the correct starting point for building CRM systems and processes is the customer journey: the totality of interactions and transactions that customers experience as they engage with a company.



Built correctly, CRM processes and systems can become the engine of growth by supporting the delivery of customer experiences that inspire recommendations and repeat purchases.

Customer information fuels your business engine

To work properly, all engines need a regular supply of good quality fuel and in the case of customer relationships, that fuel is customer information. It includes their needs, preferences, and a record of all their interactions and transactions. In today's socially connected world, this information extends to what people say on social networks; just because the company is not listening, doesn't mean customers aren't talking.

To build a comprehensive, single view of the customer, you need one data repository, accessible across the company – your CRM system. This paints a dynamic picture for your employees to respond to customers both individually and as a collective group.

CRM: the heart of a connected customer framework

CRM is truly holistic, a process that requires the whole company. After all, customers don't see the lines and boxes that make up a company's structure.

Customers demand choice of channels and will hop from one to another at different interactions. At each stage, they expect the same, high level of service. Regardless of who collected the customer information, it must be added to the single view of the customer.

Teams across the company contribute to and access the single view of the customer. This enables them to contextualize each interaction and demonstrate their understanding of the customer.

Information drives action. When the individuals within your company know that a customer needs attention, whether in the form of sales, support, or service, they have the context and data at their fingertips to provide high quality interaction.

Customer feedback and information can then be used to generate management reports and integrate with other CRM data (e.g. transaction history) to improve the quality of the insights available.

"CRMtrends.com asserts that

CRM will continue to aim to understand customers through extensive data collection and analysis. Batchbook president Pamela O'Hara also notes that by centralizing customer data through CRM, businesses will be able to target and engage customers more effectively. CRM data won't end with generating leads for the sales team but will be a continuing process that also includes maintaining relationships with a growing customer base."

"Top 6 Trends in Customer Relationship Management (CRM)"

:: Michael Gabriel Sumastre ::

Techopedia, April 2012



Building the Connected Customer Framework requires time and investment in processes, systems, and people to deliver the real promise of CRM. Deliver quick wins by using surveys to collect feedback to highlight which interactions most frustrate or delight your customers.



REAL-WORLD TIP

2 UNPACKING CUSTOMER EXPERIENCE

Good CRM delivers winning customer experiences, which significantly impacts people's willingness to make an initial purchase, repeat purchases, and recommend to others.

Customer experience is shaped at all stages of the customer journey; it is an accumulation of experiences. Every interaction and transaction matters as the customer builds an impression of the company, which includes emotional elements.

What we think and feel about a company is shaped by what others say and with social networking, customers hear and act on others' opinions like never before.

Given these influences, companies must master six dimensions that make up the Total Customer Experience. Even in a B2B environment, how customers feel about a company matters.



For each interaction on the customer journey, establish which elements of the Total Customer Experience matter most. Ensure that you design these into your customer experience and that they figure prominently in the feedback you gather at that stage.

REAL-WORLD TIP

@clicktools: "Even in a #B2B environment, how customers feel about a company matters."

#CRMRelationships



TWEET THIS

twitter.com/clicktools

1. PROVIDE A GREAT PRODUCT OR SERVICE.

Your product or service is the core of customer experience and the starting point for a winning one. However, your product alone will rarely ensure success.

2. BE EASY TO DO BUSINESS WITH.

Understand exactly how your customer does business with you and make it as easy as possible. From the design of your website to your call center to your invoices, simplicity and clarity are keys to success.

3. BE NICE TO DO BUSINESS WITH.

People buy from people they like. Business relationships, just like personal ones, require respect and communication to survive. This may seem like a no-brainer, but "be nice" should be one of the mantras of your company culture.

4. MANAGE YOUR REPUTATION.

Buying decisions are often subject to what you do outside the relationship with the individual customer. Take the purchase of gasoline from BP as a large scale example. The product, the ease of doing business, and the value have not changed at all, but people's willingness to support the company has collapsed as a result of the Gulf oil spill.

5. ENGAGE WITH YOUR CUSTOMERS.

The more you can do to help your customers take control of the buying process, the better your chances for a sale. Give them all the tools necessary through information, social media, and educational resources to make an informed decision.

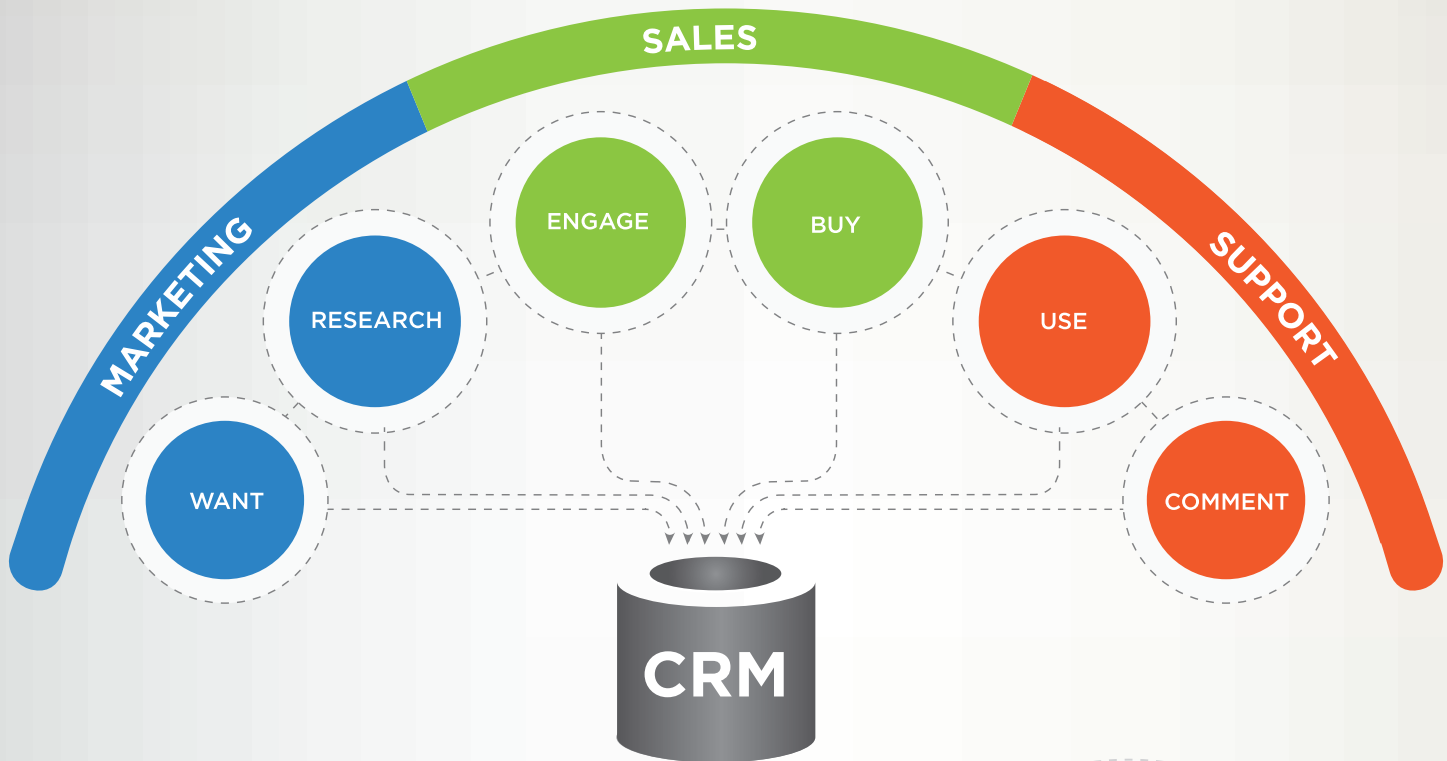
6. OFFER THE BEST VALUE FOR THE MONEY.

The cost of your offerings must match your customer's expectations. If the price doesn't satisfy the expectation, customer experience can suffer a life-threatening blow.

3 CONNECTING CUSTOMER EXPERIENCE AND CRM

To improve customer experience, a single view of the customer is essential. That demands investment in CRM systems as well as processes and people.

Your CRM strategy must be designed around the customer journey.

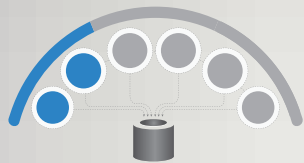


Across areas of your company, the journey will include the following phases: **want, research, engage, buy, use, and comment**. This is rarely a simple, linear path; iterations and loops are the norm and the journey is often repeated as customers make repeat purchases.

In each of the phases, there are numerous ways to collect feedback and enhance the single view of the customer. The following are proven tactics to improve your relationships with customers and as a result, increase your marketing, sales, and support success.

40%
of companies
cite complexity as
the biggest barrier to
improving multi-channel
customer experience.

:: Econsultancy ::



WANT & RESEARCH

From the very first steps of the journey, companies need to capture information from prospective customers. At this stage, it is important to demonstrate your ability to respond rapidly to their needs.

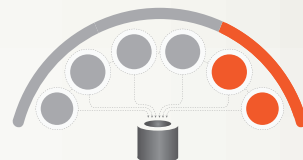
- Brochure/Demo request forms
- Requests for collateral
- Inbound call scripts
- Partner lead registration
- Webinar registration
- Event registration
- Campaign landing pages
- Facebook contact forms



ENGAGE & BUY

As customers shift their emphasis from “I’m looking” to “I’m interested,” the process of progressively profiling customers accelerates. The exchange of information becomes more focused as customer requirements become clearer.

- Web2Lead forms
- Quotations
- Win/Loss surveys
- New customer insight surveys
- Stay in touch forms
- Purchase order forms



USE & COMMENT

As the customer uses their purchase, a happy buyer can rapidly morph into an angry user if the proper communication channels are not available. Providing easy access to support creates advocates and repeat customers.

Customers now use social media as a way to sing your praises or to warn others not to make the same mistake. These views are a vital part of the customer voice and need to be captured and added to the single view of the customer.

- Product registration
- Web2case forms
- Closed case survey
- Project satisfaction surveys
- Relationship surveys
- Complaint capture
- New product ideas
- Twitter to case*
- Facebook to case

giffgaff, the UK’s fastest growing Telco and the vanguard of social marketing, **handles 100% of its support calls through its online community.** They have no call center, not one support agent. Their average response time to support questions is 93 seconds. And their Net Promoter Score—the measure of whether customers would recommend them to a friend—is, at 73, one of the highest in the world.

:: Lithium Technologies ::

“For decades, businesses have set the rules, controlled the buying process, and dictated terms to customers. Not anymore. Now, customers can flex their collective muscles and put a company on its heels with increasingly vocal comments and the dollar power behind it.”

READ BLOG POST

clicktools.com/blog

* Clicktools recently introduced Twitter to CRM, which allows you to launch a search of the Twittersphere and bring the results into CRM. Whether tracking and responding to unhappy customers (Tweet to case) or monitoring product interest (Tweet to lead), Clicktools now extends SocialCRM.

SIX-STEP ACTION PLAN

Keen to put relationships back in the center of CRM to improve customer experience? That puts you ahead of most; only 26% of companies have a well-developed strategy for improving customer experience. But how do you go about connecting customers and CRM? Here are six steps to success.

@clicktools: "Only 26% of companies have a well-developed strategy for improving customer experience. Do you?"



#CRMRelationships

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STEP 1

Do your sums and estimate the financial benefits of improving customer experience. A few figures showing the dangers of losing to competitors will create a sense of urgency, especially if you need executive buy-in and plan to rally the broader organization.

Also, it will be helpful to gather any research on what customers think about your company and products. Tangible evidence (e.g. survey and poll results, complaint and complimentary letters, etc.), rather than internal anecdotes, which tend to include personal bias, will help keep your team on track as you embark on the action plan.

STEP 2

Assemble an internal team to map out your customer journey. Pick people who really care about customer experience to ensure you capture the best potential perspective. When building your customer journey map, remember to include social networks where your customers share views, research their needs, and seek information.

STEP 3

For each of the key interactions on the journey answer the following questions:

- A. At this step, what matters most to the customer?
- B. What customer experience should we provide? Try not to get hung up on how you do things today. Strive to outline the ideal (not the current) situation.
- C. What constitutes success for the customer and what therefore should we be measuring?
- D. What does the customer do next? At each interaction point, be sure to guide customers toward a next-step of some kind. This does not need to be a sale or upsell; it can be an event, offering of information, education, or other interaction.

"[2012] will carry big expectations for Customer Relationship Management systems (CRMs). Firstly, the businesses who use them will be expecting them to do more (and for less). Secondly, end customers — increasingly aware of what CRM systems are capable of — will be even more insistent that businesses deal with them as they expect."

"5 CRM trends to seize on in 2012"

:: Ian Whiting ::

CIO.com, November 2011

STEP 4

Build listening mechanisms into the interactions to gather key information and test the quality of the customer experience. Contextualize the interactions and listening mechanisms using CRM information.

Customers get annoyed (rightly) when they are asked questions they have already answered or companies do not tailor their interactions using information they have shared.

STEP 5

Map out the technical specifications to integrate key measures and information gathered from the customer journey into your CRM system. If you have a CRM Admin, now is the time to pull that person into the room, if s/he wasn't already on the project team. Make it clear that success requires associating feedback data with individual contacts and related records to enhance the single view of the customer.

STEP 6

Implement alerts and workflows to address any issues raised by the information captured, for example, low satisfaction score or requests for sales contact.

Use the information collected to generate role-relevant reports. Where possible, look to integrate data from the information collected to provide reporting relevant to users' roles and responsibilities.

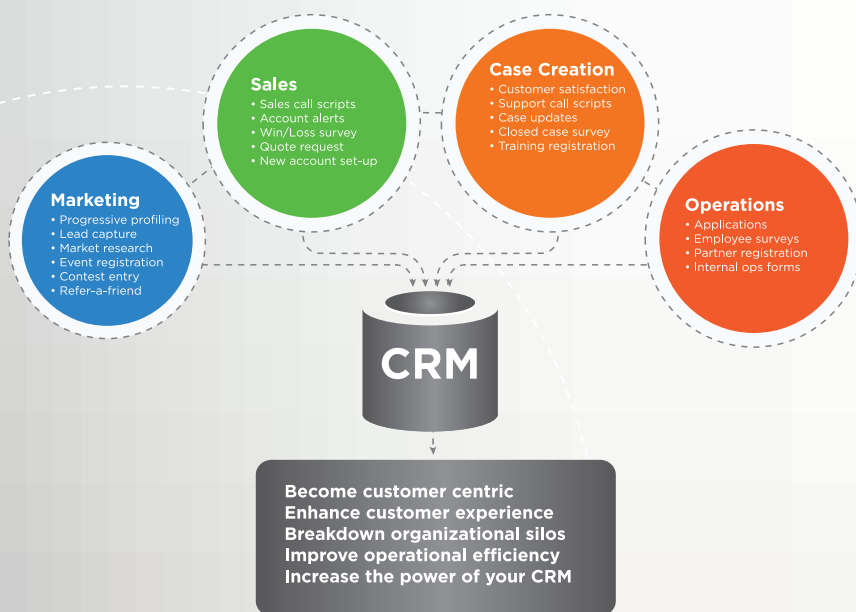
5 MORE SUPPORT FOR YOUR ACTION PLAN

As you get further into planning how you leverage CRM to improve customer experience, here are several best practice suggestions to streamline the process and the results.

Automate deployment. For example, lead discovery forms or closed case surveys can be issued using CRM workflow or Clicktools Scheduled Deployment to remove the costs and time of this administrative task. This not only significantly reduces costs, but also ensures rapid, even instantaneous follow-up.

Build business rules that enforce opt-outs and limit how many surveys are sent. Across departments, you'll want to control the number of surveys an individual can receive in a set period of time. For example, if your marketing department is sending one this week, make sure your customer support department isn't doing the same. Prioritize what goes when.

Ensure that surveys and forms represent your brand accurately. Collecting information is part of the customer experience and it should enhance, not detract from the brand. It is amazing how many CMOs will spend millions on brand identity and then allow staff to send out surveys using a crude, off-the-shelf theme provided by the survey/form provider, or worse yet slap a logo in the top left corner and call it brand compliant. Be sure to establish standards for question structures, brand look and feel, and style of language that are applied across the company.



51%

of customers say companies are impersonal: they can't even get their names right!

:: 2011 Customer Experience Impact Report ::

Provide different channels for customers to give feedback, including social media.

Where the information requested is triggered by a specific event, it should use the channel chosen by the customer. For example, a survey may trigger a follow-up with a customer reporting a low satisfaction score or a lead form may initiate a sales process. Build the follow-up alerts and reporting in CRM, providing one place for employees to manage the whole customer journey.

Make it easy for employees to see customer information. For example, results of a closed case survey should be visible in the case, contact, and account records of the customer. Of course, this should be overridden if anonymity has been requested.

CONNECT THE DOTS ALONG YOUR CUSTOMER JOURNEY WITH CLICKTOOLS

We wish you the best of luck in implementing the action plan! See for yourself that putting relationships back into CRM will enhance customer experience – and as a direct extension, strengthen your business. As always, we'd like to hear about your experiences as well as provide additional information.

clicktools.com

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CONTACT US

LEARN MORE ABOUT CLICKTOOLS

Clicktools is the leading solution to collect, centralize, and act on customer interactions, leveraging the power of CRM. Through every stage of the customer journey, Clicktools enables you to improve your overall customer experience.

From new lead capture to satisfaction surveys, and everything in between, Clicktools gives you the tools to keep customers engaged and active across your marketing, sales, and support functions:

- **Collect** customer information through surveys, scripts, and forms.
- **Centralize** the data you've collected into your CRM.
- **Act** on the insights automatically to deepen customer relationships.



clicktools.com/assessment



We are keen to know what you think – we are a feedback company after all.

GIVE US FEEDBACK

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