



Customer Experience Playbook



How to Drive a Better Customer Experience with Your Information

The nature of customer engagement is changing.

New channels of communication are allowing brands to communicate with customers in a variety of different ways, opening up a number of new customer experience touchpoints. Technologies are keeping customers connected to organizations in ways that were never possible before. And this has helped boost the value of customer relationships: according to the Harvard Business Review, the value of customer relationships as a share of the enterprise's total value doubled over the course of a decade, to nearly 20 percent.

Customers today have more power than ever before to affect public perception of a brand. Consider the example of Dave Carroll, a Canadian musician who had his guitar broken on a 2008 flight on United Airlines. When the company refused to reimburse him for the guitar, he recorded a song called “[United Breaks Guitars](#)” and posted it on YouTube. To date, the video has been viewed nearly 16 million times, and United was forced to back down in the face of overwhelming negative publicity.

“The old marketing adage is that a satisfied customer will tell 5-7 of their friends about the experience, whereas a dissatisfied customer will tell 15-20. Today, an unhappy customer will tell a million of their closest strangers.” – Joseph Jaffe, *The Customer Service Manifesto*

Considering that a customer now has the ability to cause a significant shift in public sentiment for or against a brand in the space of a few hours, that **just a 5 percent increase in customer retention can boost lifetime customer profit by 50 percent, and that improving customer experience by one percent can result in up to \$175 million more in annual revenues**, it's clear that customer relationship building should be a high priority for organizations. Yet many organizations often ignore one of the most important factors that goes into improving customer experience: how an organization manages its information.

In this playbook, we'll discuss the importance of a strong information management policy to your customer experience strategy — how information affects customer experience at all levels of your organization, how it can improve customer relationship building and loyalty, and how it helps to build a customer-centric culture.

Getting Started: Building a Customer Relationship Strategy

According to [research conducted by Salesforce](#) this year, 65 percent of high-performing marketing leaders have adopted a customer journey strategy as part of their overall business strategy — a number nearly 9 times higher than underperforming teams. Nearly the same number — 61 percent — are also actively mapping the customer journey, a number 10 times more likely among high performers than underperformers. And 88 percent of high performers say that a customer journey strategy is critical to the success of their overall marketing.

But this strategy must include more than just mapping the customer journey. It should also find each and every single one of those customer touchpoints and determining how to maximize their quality. It's examining each of the processes that affect information transfer to those touchpoints, and finding ways to eliminate bottlenecks or hang-ups. And it's examining ways to deliver a better customer service experience.

In general, such a plan should do three things:

- ▶ Open up the flow of information throughout your organization
- ▶ Integrate new technologies to expand the quality of the customer experience.
- ▶ Create a seamless customer experience across all touchpoints

Why Information Matters

Information is the lifeblood of your organization. But many organizations underestimate its impact on customer experience, perhaps because they view customer experience as something that's solely the responsibility of customer-facing workers.

That attitude is not only wrong, it's detrimental to an organization.

Customer experience touches every aspect of any organization. Start with sales — often the first touchpoint between an organization and a customer. When's the last time you heard a salesperson in your organization say "I wish I had less information about a potential

NEW STRATEGIES CAN PAY OFF BIG

Adopting a customer relationship strategy can have a big impact on your organization. According to marketing leaders surveyed by Salesforce:

- 73% think that adopting such a strategy positively impacts customer engagement
- 70% say it has helped grow revenue
- 65% say it has positively impacted customer churn rates.

Source: Salesforce, 2016 State of Marketing report

lead?" Understanding a lead's business challenges and motivations for purchasing translates directly to a better interaction, and by extension, to better sales. Knowing what competitors are offering and how your products and solutions compare translates directly to better sales. The less time that sales spends looking for the information they need translates directly to — you guessed it — better sales.

This extends across the entire business. Finance can help reduce billing errors by having a better handle on information. Marketing can use information about target audiences to modify and tailor the right message. Customer service — well, customer service should be obvious. And it even matters for HR, because building a customer-centric culture within your organization is something that rests on the people you have. In all, a holistic approach to the customer experience requires an organization-wide commitment to sharing information and collaborating together.

Joyce Hostyn perhaps puts it best:

“The most important touchpoint between an organization and its customers are its employees. Human to human connections are where relationships are forged, engagement occurs, and trust is built. And yet, this is the touchpoint most organizations most neglect.”

To do their jobs most effectively, people need the right information, at the right time, to make the right business decisions. That assuredly extends to customer experience — and while information alone doesn't create a quality customer experience, maximizing the value of your information is an absolutely vital component of any successful customer relationship strategy.

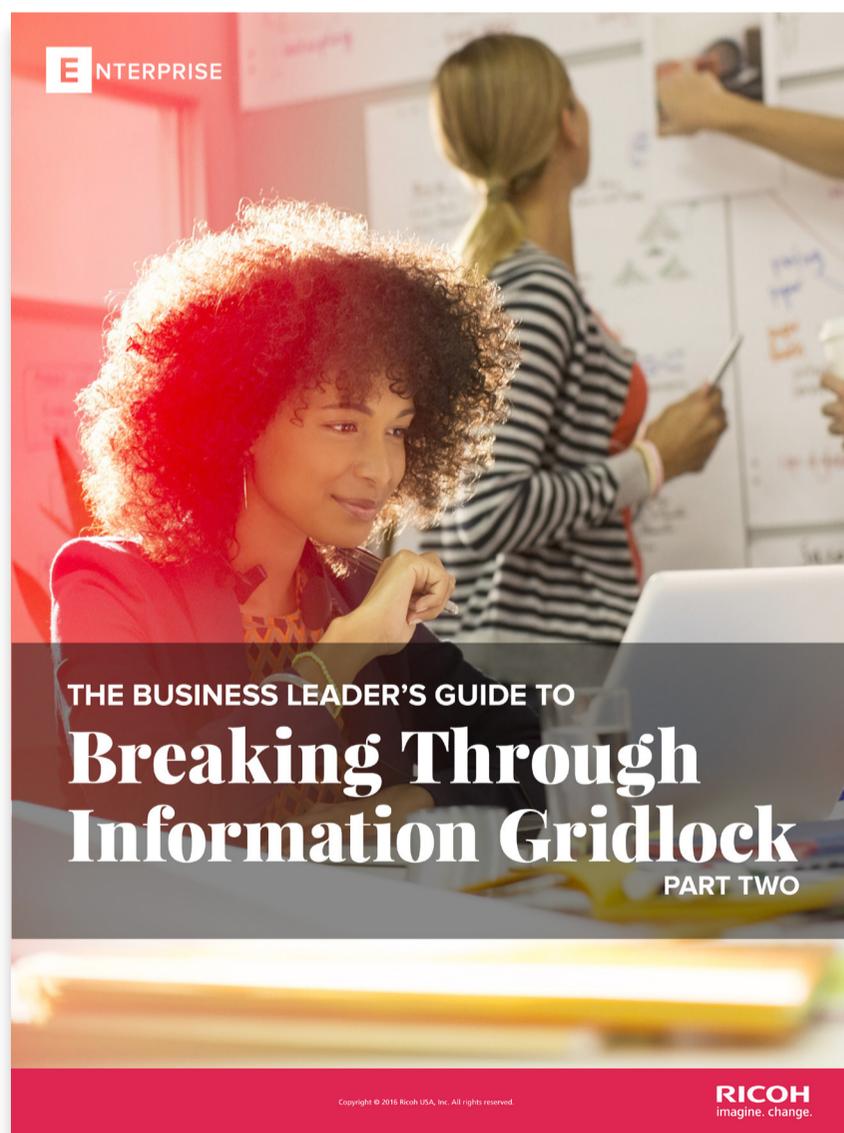
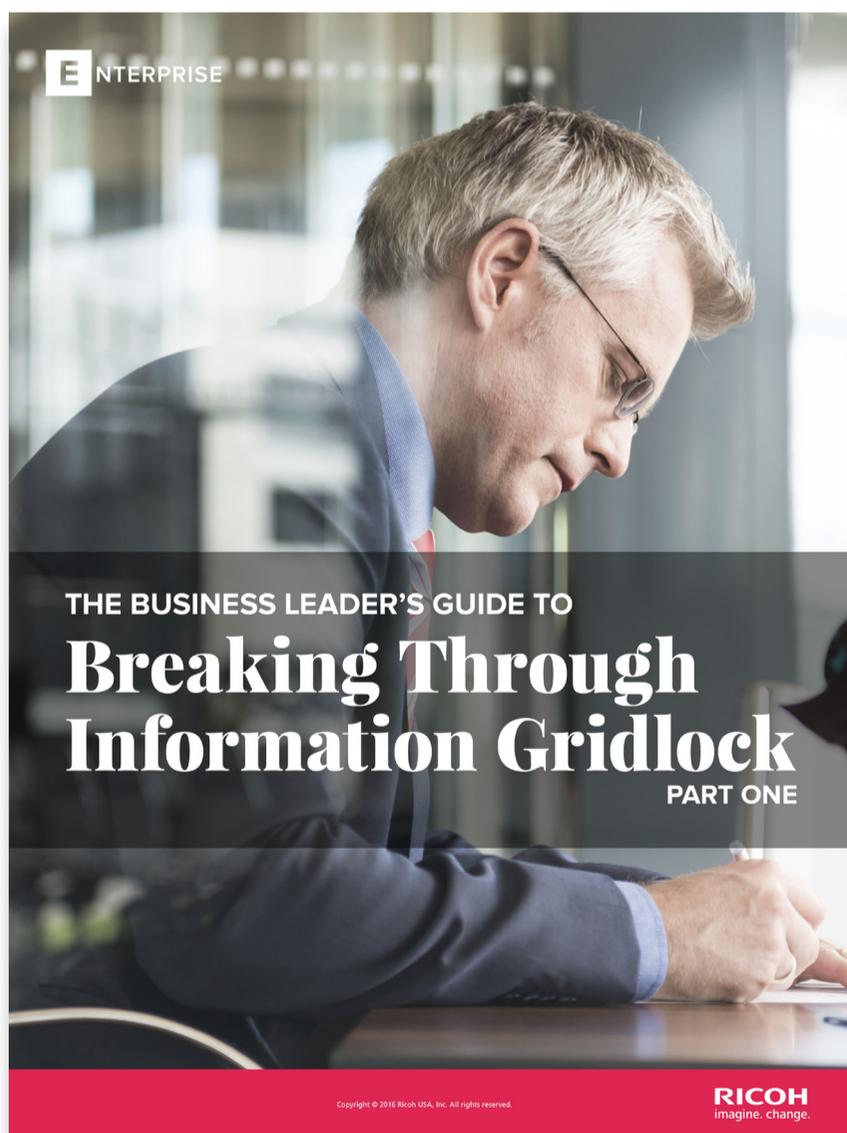
DID YOU KNOW

When it comes to improving customer experience, high-performing teams are 17 times more likely to excel at collaborating across business units.

Source: Salesforce Research

Wondering how you can break down silos within your organization and get your critical business information flowing freely once again? Check out this two-part series:

The Business Leader's Guide to Breaking Through Information Gridlock



Choosing the Right Technology

Every business is different, and what works for you may not for another. In general, however, the tools you need to maximize customer experience are technology that makes it easy for your customers and workers to access, share and act upon information.

This creates something that Forrester calls the “customer experience ecosystem.”

Let’s take a quick look at how this affects customers and workers differently:



CUSTOMERS

Long gone are the days when the customer journey down the purchasing funnel was a simple linear process of moving from one touchpoint to another. Instead, the customer path has become much more meandering. There exist today any number of ways that a customer could interact with your organization, and to provide a holistic experience to the customer, you can’t afford to neglect any one of them. This can include:

- ▶ Social media platforms
- ▶ Websites
- ▶ Apps
- ▶ Microsites
- ▶ Physical locations
- ▶ Phone

As technology advances, it’s likely that more touchpoints will become part of the customer experience. However, Forrester says that the workforce “isn’t taking advantage” of the tools available to them to help maximize the value of these touchpoints — and that’s a huge turn-off for customers.

According to the firm:

“The tools that have not become essential parts of workers’ toolkits are the very technologies that make it easier for those workers to locate information, access expertise, and share their knowledge.”

Or to put it another way, information isn’t getting to where it needs to go. For example, think of your organization. Does your social media team have the same information about customers as your customer service team? How about your billing and payments team, or your sales team?

WORKERS

Technology is an everyday part of all our lives, but for your workers, technology should be a means with which to make better use of information. Forrester says that a customer experience ecosystem is only valuable when companies are able to “enable the free-flowing knowledge and information sharing” that makes these systems successful.

To that end, leaders should search out technologies that accomplish one or more of the following goals:

- ▶ Provides a new, easy-to-use way to interact with customers
- ▶ Offers insights into a customer’s habits and information that can help promote stronger engagement between your organization and the customer
- ▶ Promotes collaboration between coworkers or departments that enables a stronger customer experience

These can include examples of technology like **virtual reception**, which companies are using to overcome the limitations of physical locations (e.g., staffing) as well as the impersonality of other forms of customer service. Rather than wait in long lines for an agent or dealing with a faceless call center, a kiosk allows organizations to appropriately staff physical locations at all times while providing a much more personalized, engaging connection.

Another example would be a customer relationship management (CRM) software suite designed to aggregate data gathered about customers at all potential touchpoints, create a database that can be accessed by all customer-facing workers, and use it to provide that holistic experience your customers are looking for.

But what does that experience look like?

Keeping It Simple

“Treat others as you’d like to be treated.”
– The Golden Rule

It sounds so simple, doesn’t it? After all, we’re all customers at some point. But it’s not quite that simple.

Especially across large enterprise organizations, providing a quality & cohesive experience can be a challenge. But the goal should always be to make things as easy as possible for the customer. Every time a customer has to take an action — inputting their information into an online form, making a phone call, emailing customer service — it creates another opportunity for them to disengage from your organization. Your job is to limit those opportunities, and once again, information is the best tool you have to tackle that challenge. Consider these two examples:



Disney

You might be surprised at the steps that Disney has taken to employ better technology and information management techniques to provide a better customer experience. Think back to the headaches of most theme park trips: long lines, lost items, losing your way around the park. Disney has thought through all of that with the creation of the MagicBand.

Integrated with the My Disney Experience app, the MagicBand is a simple all-in-one device worn on your wrist. It’s an admission pass, so that you can skip the long lines at the box office and scan your wrist at the gate. It’s a wallet, so you can buy food and souvenirs in the park without ever having to take out a credit card. It’s a reservation, so you can sign up for a spot on Space Mountain hours ahead of time, rather than having to spend hours of your vacation waiting in line. It even provides access to photos of your adventures — and at the end of a long day in the Magic Kingdom, you don’t have to worry about losing your room key, because it’s that too.

Each of these things — lines, wallets, room keys, photos — is a potential pain point for a customer. But through masterful use of technology, Disney has simplified this experience in a way that’s more rewarding for the customer and provides a personalized experience, while gathering valuable information about visitor habits: where they went, what they bought, what they ate, etc.

Sweden

Recently, America celebrated its least favorite holiday: Tax Day. And while nobody enjoys paying taxes, what makes Tax Day so disliked isn’t sending money to the government. Rather, it’s the labyrinthine U.S. tax code and the countless pages of forms to fill out. No wonder the [National Taxpayers Union](#) estimates the amount spent on tax-preparation services to be nearly \$32 billion every year.

Compare this to [our friends in Sweden](#), where the government sends out tax forms already filled out with all the relevant information. After a quick review, you “sign” the document with a text from your phone. Swedish taxes can take preparers less than 15 minutes. And while the IRS is one of the least popular government agencies out there, the Swedish Tax Agency is one of the most [well-respected government bodies](#) in the country. By making more effective use of available information and making it easy for taxpayers to interact with the organization, the Swedish Tax Agency is providing a holistic customer experience that more organizations should emulate.



All About Your Information

Customer experience has a number of different contributing factors, and expectations are changing all the time. But information is always at its heart, whether it's finding ways to better share customer data within your organization, using data to predict customer behaviors and purchasing patterns, or personalizing a website or app experience.

As with most things in today's business world, organizations that make most effective use of their information will stand out from the rest. And considering the power that customers today now have, failing to effectively use this information could also create significant problems for your organization. While the inertia of "doing things like you've always done" can be a strong force, the cost of doing nothing is high. [One study found](#) that for every customer lost, it could take up to 4 new customers just to make up the revenue and margin lost. With numbers like that, it's clear that many organizations must do more to address their information problems and retain one of their most prized assets: their customers.

For more information about how to unlock the power of your information, be sure to keep up-to-date with [WorkIntelligent.ly](https://www.workintelligent.ly) for the latest happenings in the new world of work.