

Doodle

GROWING CLIENT LOYALTY REMOTELY

Research Study
June 2020



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INTRODUCTION

Over the last few months, the entire world has gone into partial or full lockdown, leaving businesses vulnerable and strained, both operationally and financially. In some cases, clients have withdrawn their contracts or reduced their retainer fees as a means of staying financially viable during and post the current crisis.

As a [recent study by Thryv and America's Small Business Development Centers \(ASBDC\)](#) reveals, three-quarters of U.S. small businesses have already experienced a large drop in demand. Meanwhile, 60 percent of small businesses are reasonably concerned about their long-term recovery. One fact is for certain: client trust and loyalty is currently being put to the ultimate test. With all client meetings being moved online, businesses (and their employees) find themselves fearful that this sudden change could doom their client relationships and set them up for long-term business losses.

Now consider this: More than 99 percent of all businesses are small businesses and they employ approximately half of the US workforce. However, [most small businesses](#) lack the budgets and resources to weather long-term interruptions. And even one lost customer can make it tough for a small business to recover once the crisis has subsided.



SURVEY METHODOLOGY & OBJECTIVES

Doodle surveyed more than 1,100 employees who work full-time and/or part-time for businesses in the United States. The purpose of the study is to fully understand the client retention fears and challenges employees may face as their interactions with clients have moved online. Additionally, the study aims to uncover the various strategies employees are currently employing to become more dynamic, engaging presenters and participants in online meetings in order to grow client relationships, trust and loyalty. The survey was fielded in early May 2020.

KEY FINDINGS & TRENDS

Employees Fear Client Retention Is Doomed If Online Meetings Are the Only Option

Did you know it costs five times more to attract a new customer than it does to retain an existing customer? But it's not all that easy to keep clients happy, engaged and loyal. According to [research from HubSpot](#), 55 percent of customers now trust companies less than they used to.

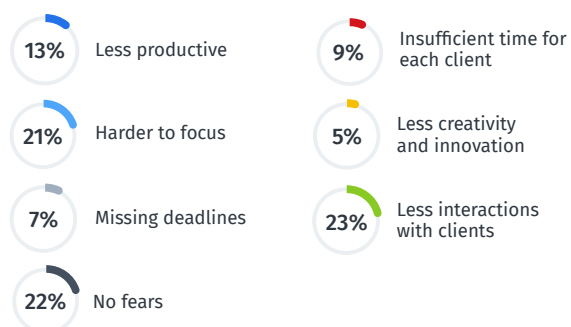
Customer trust and loyalty play a major role in the growth and success of any company today. It comes down to certain factors, such as interacting one-to-one with clients, dedicating enough time to each client and, ultimately, being highly focused and productive to deliver high-quality results.

Historically, meetings have been the central connector between businesses and their clients. Employees use meetings to hold regular check-ins with clients - to provide updates on current projects, outline new strategies and answer client questions candidly. Employees also use meetings to conduct assessments of client business (i.e. key strengths, weaknesses and recommendations for improvement).

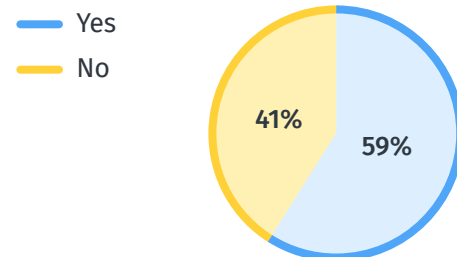
More often than not, these meetings are conducted as a mix of both in-person and virtual meetings. For example, weekly check-in meetings can easily be conducted via video conferencing tools like Zoom, Skype and Google Meet. However, other types of meetings, such as new business/client proposals and quarterly business reviews (QBRs), are better suited to be conducted as in-person meetings as they involve multiple stakeholders from different departments and locations.

Given the different types, purposes and goals of [client meetings](#), it's understandable that employees fear customer success will be doomed if online meetings are the only option (as has been the case amidst the coronavirus outbreak). This is what our study found, with 23 percent of the surveyed employees fearing that shifting all client meetings online will result in fewer interactions with clients and 21 percent worrying it will be harder to focus. On top of that, 13 percent of the respondents fear they'll be less productive and 9 percent are concerned they won't have enough time to dedicate to each client. To make matters worse, over half (59 percent) of the respondents said they are finding it more challenging to engage with their clients online.

What's your biggest fear about shifting all of your client meetings online?



Compared to presenting in-person, are you finding it more challenging to engage with your clients online?



To minimize the potential loss of clients, employees should think about streamlining the meeting scheduling process, from start to finish. Rather than send 30+ emails to 10 different stakeholders and spend days (even weeks) attempting to lock down a single date and time for a meeting with your client, use an [integrated, secure scheduling technology platform](#). This will allow you to focus your attention on meeting your clients' needs, providing ongoing support and delivering top-notch results.

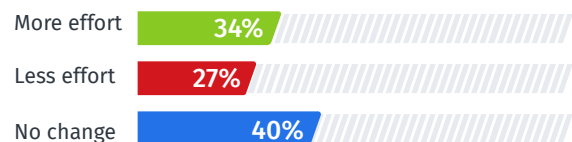
The Pressure to Keep Clients Happy Has Employees Running Ragged to be Superstar Performers

Pressure is a major motivator. It motivates students to study and prepare ahead of exams; it motivates athletes to train harder; it motivates actors to study their craft. As our study found, pressure has a similar effect on businesses, driving employees to go above and beyond to keep clients happy, engaged and, ultimately, loyal. For example, 34 percent of the surveyed employees said they are making more of an effort to prepare for virtual client meetings than they normally would for in-person meetings.

And as the pressure to hold onto clients mounts, many employees are willingly sacrificing their own personal time to make themselves available for clients. In fact, 46 percent of the respondents said they have been conducting client meetings outside of normal working hours to accommodate their clients' schedules. In doing so, these employees run the risk of pushing themselves towards exhaustion and burnout, both of which can take a toll on their mental health and wellbeing.

Additionally, 55 percent of the surveyed employees said they find themselves going the extra mile to be more dynamic and engaging in online meetings as a way of overcompensating for the absence of physical interactions. If online meetings are dull, don't achieve the designated goals or fail to inspire clients' confidence, that will only add to the existing pressures employees are facing right now.

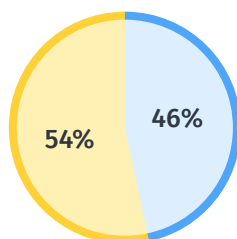
Are you making more or less of an effort to prepare for virtual meetings than you typically do for in-person meetings?



Note: Figures may not add to 100 due to rounding.

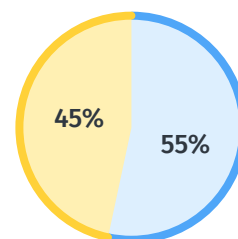
Are you conducting virtual client meetings outside of normal working hours in order to accommodate their schedules?

— Yes
— No



Do you find yourself going the extra mile to be more dynamic and engaging in online meetings as a way of overcompensating for the absence of physical interactions?

— Yes
— No



These findings show that employees are keenly aware of the potential impact of COVID-19 on their client relationships. If businesses use these fears and concerns as a motivator - and take the necessary steps to prepare ahead of client meetings - they will likely come out of the current crisis with stronger customer trust and loyalty.

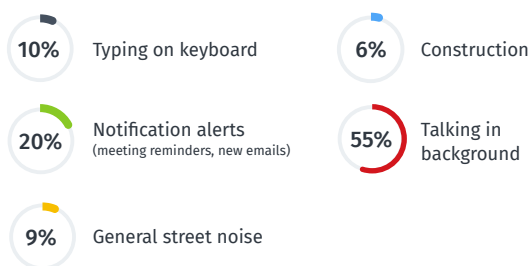
One way to keep your clients satisfied and engaged is to [treat them as individuals, rather than as entities](#). Make every interaction - be it in an online meeting or in-person meeting - feel like it was customized to match your clients' needs, pain points and priorities. So if there are five different stakeholders who are involved in the business of one of your clients, don't lump all of these stakeholders together as one. Instead, set up individual [one-to-one meetings](#) with each of these stakeholders. Give them your personal attention and focus. Additionally, don't use the same communication style, frequency and approach to communicate with each stakeholder.

Noise Throws Online Meetings Off-Track and Leads to Miscommunication

Remote work life can be filled with distractions. This is especially true as entire families are currently stuck at home together indefinitely. Kids are home 24/7 - needing to be homeschooled, cared for and entertained. Spouses and partners are both working in the same space, talking over each other in their online meetings. Items like sofas, beds and televisions are close by and can be tempting distractions.

But as our study indicates, noise is one of the most underestimated distractions during online client meetings. For example, talking in the background (55 percent) is most likely to disrupt employee focus. Surprisingly, notification alerts, such as meeting reminders and new emails (20 percent), are considered far more disruptive and distracting than construction sounds (6 percent).

Which type of background noise is most likely to disrupt your focus in virtual meetings?

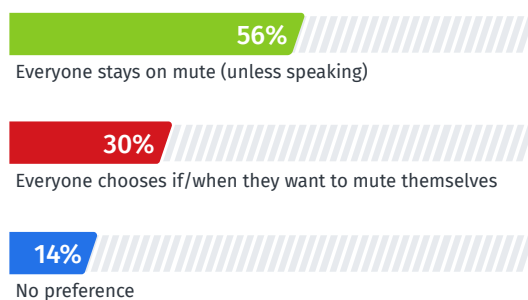


One way to minimize sound-related disruptions in online meetings is to shut down your email inboxes (i.e. Microsoft Outlook, Gmail) so that new mail alerts don't interrupt your train of thought. If you choose to keep your email open during online meetings, then go to the settings and turn off both visual and sound notifications. There are also noise cancelling apps, such as Krisp.ai, which allow users to mute background noise and improve productivity during online meetings.

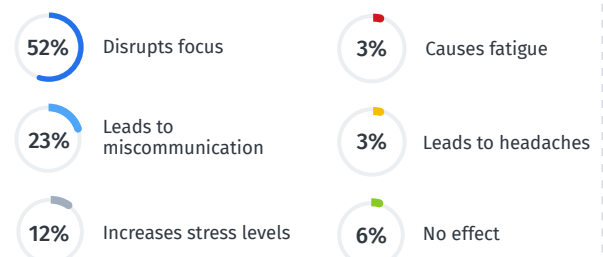
Now if you also use an internal communications tool like Slack to communicate with your teams and colleagues, turn off notifications to avoid pop-ups appearing on your screen while you're in the middle of an important client meeting.

What's more important is the impact of noise on client relationships and loyalty. For instance, 52 percent of the surveyed employees admitted that background noise and/or poor audio quality disrupt their focus. Meanwhile, 23 percent said it leads to miscommunication with clients. This is problematic for a few reasons. If noise results in miscommunication, it could cause employees to go in the wrong direction on a client project, thus wasting the client's time and money. Worse yet, it could lead to performance issues, which could negatively impact the client's long-term business growth. As a result, client loyalty and retention could be at serious risk - all because simple steps weren't taken to minimize noise and distractions during online meetings. Given that noise can disrupt your train of thought and even lead to miscommunication with clients, it's not so surprising that 56 percent of the respondents said they prefer that everyone stays on mute (unless speaking) during online meetings.

What's your preference when it comes to using the mute button during online meetings?



How does background noise and/or poor audio quality affect the success of your virtual meetings?



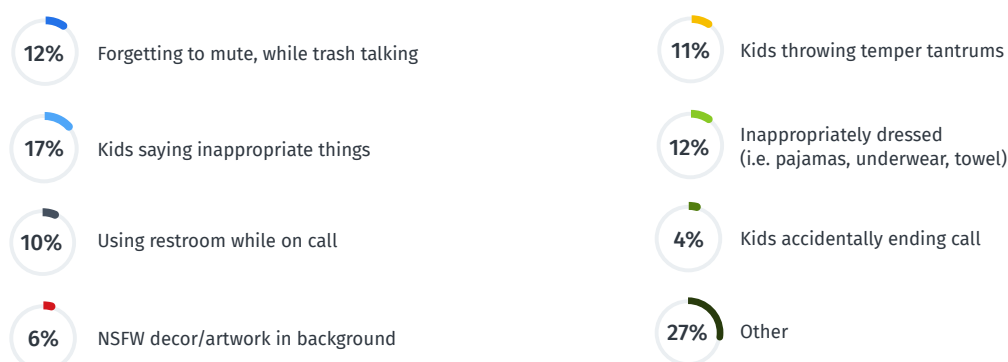
Note: Figures may not add to 100 due to rounding.

Online Meeting Faux Pas, Such as Kid Bloopers, Are Endearing and Relatable to Clients

According to our study's findings, 32 percent of the respondents said the funniest moments in their online meetings have involved kid bloopers, such as kids saying inappropriate things (17 percent), kids throwing temper tantrums (11 percent) and kids accidentally ending calls (4 percent). Plus, 12 percent of the respondents admitted that inappropriate clothing choices, such as wearing pajamas, underwear or towels, have been a source of laughter and amusement during online meetings.

In times of change, things are always a little bumpy. It's inevitable that online meetings won't always go as planned. You may remember back in 2017 when [Professor Robert Kelly was explaining South Korean politics live on BBC](#) when his two children barged in. The blooper, as many news outlets were calling it, went viral and became a rather endearing example of how the line between home and work life has become blurred in remote work environments. While such faux pas moments might seem disastrous and embarrassing in the moment, they are often viewed as endearing and show a more personal, human side of business professionals to their clients.

What's the funniest thing that's happened during online meetings (while in quarantine)?



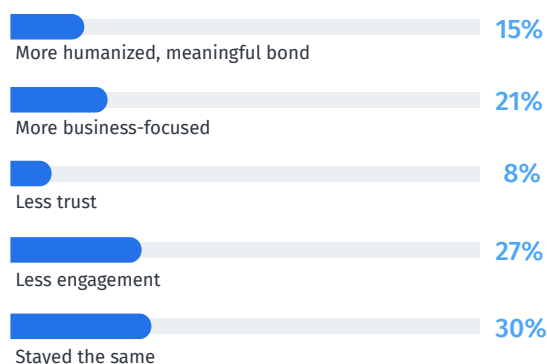
Note: Figures may not add to 100 due to rounding.

Performance Anxiety and Business Pressures Push Employees into Competitive Mode

Millions of people suffer from performance anxiety, which is also referred to as stage fright. Performance anxiety can negatively affect your self-esteem and self-confidence. As your confidence drops, you could become less focused or attentive to details, which could affect your productivity and the quality of client work. That, in turn, could create tension and less trust among your clients, which could potentially result in less client engagement and lost business at a time when businesses cannot afford to lose any clients. As our study found, these are very real and probable concerns, with 27 percent of the respondents admitting that their new work-from-home reality has resulted in less engagement with their clients.

Given these business pressures and performance anxiety, it's understandable that 63 percent of the surveyed employees said they would be willing to record and re-watch their virtual meetings (to varying degrees) if it could help them become better presenters and strengthen their client relationships. Much like athletes who watch and study recordings of games/matches to analyze their strengths and weaknesses, it appears that employees would be well-suited to follow this approach to optimize their own performance in online client meetings. Doing so could very well mean the difference between a highly engaging and trusting client relationship and a client who ends their relationship with your business.

How has your new work-from-home reality affected your relationship with clients?



Note: Figures may not add to 100 due to rounding.

How likely are you to record and re-watch your virtual meetings if it could make you a better presenter and strengthen your client relationships?



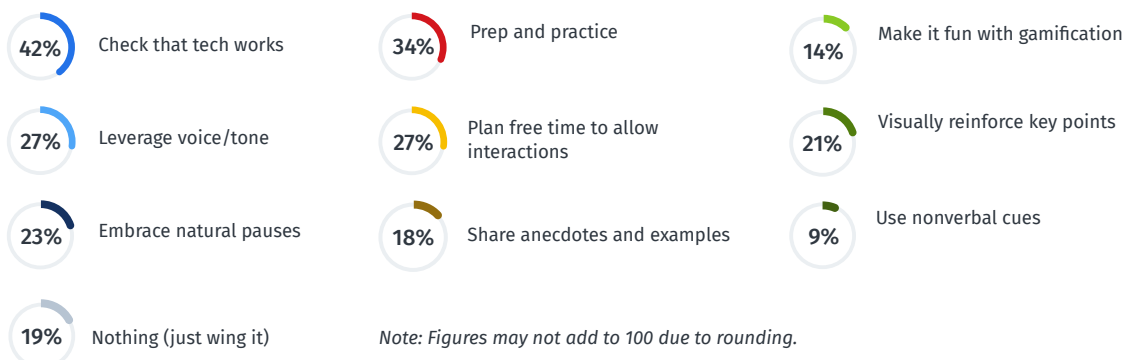
Organization, Creativity and Practice Make Virtual Meetings Perfect

We've all heard the phrase, 'Practice makes perfect.' Our study indicates that employees are heeding this advice and employing specific strategies to be engaging and dynamic virtual presenters. For example, 34 percent of the respondents do their own preparation and practice ahead of meetings. Plus, 27 percent plan free time in the meetings to allow for interactions, 21 percent visually reinforce key points and 18 percent share anecdotes and examples. All of these strategies combine organization, creativity and practice.

Meeting organizers aren't the only ones responsible for making meetings efficient, seamless and engaging. Participants share an equal responsibility. According to our study's findings, there are some simple steps that will help you show up prepared for online meetings with clients. The most common and effective preparation step, for example, is to send an agenda ahead of time (31 percent). Other effective strategies include: doing research (12 percent), reading relevant materials (12 percent) and designating a meeting 'leader' (10 percent).

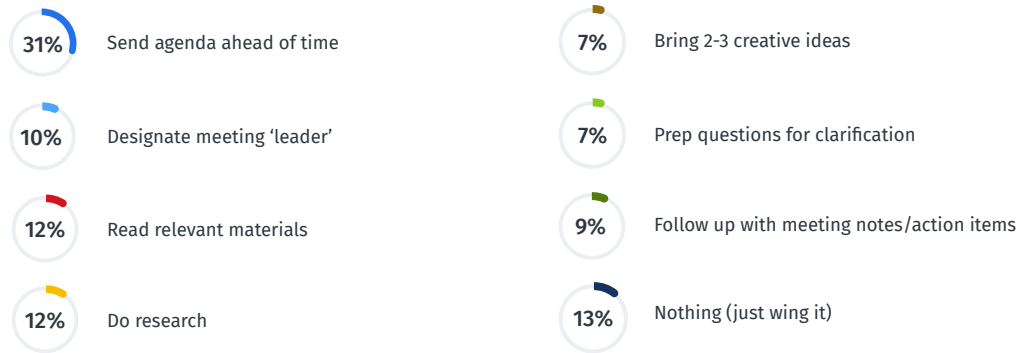
Surprisingly, 19 percent of the respondents said they do nothing to be an engaging presenter in online meetings, while another 13 percent admitted they don't take any measures to come prepared to online meetings. This is somewhat surprising given the fact that the surveyed employees have already expressed a number of fears about maintaining client trust and losing client business. We would highly recommend that employees don't just wing it when it comes to meeting with clients. Take the time to do research, come up with a few creative ideas and follow up with action items. By employing these strategies, it could help strengthen client trust and engagement, while also preventing clients from leaving and giving their business to a competitor.

What strategies are you using to be a more engaging presenter in virtual meetings?



Note: Figures may not add to 100 due to rounding.

What's your top strategy for coming prepared to virtual meetings with clients?



Note: Figures may not add to 100 due to rounding.

Meeting Overload Is Bad for Employee Mental Health

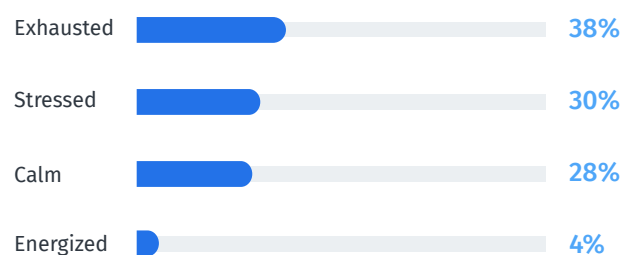
Employees spend more time working than they do in their home/personal lives. If employees are stressed and feel overwhelmed by their work environment/responsibilities, it can take a serious toll on their mental health and well being.

Shifting to full-time remote work can be a difficult and complicated adjustment. In many instances, this has also led to a significant increase in the number of meetings being held each week. So while an employee may have previously only had a total of 10 meetings in a single week, that number could jump up to as many as 30 meetings in a single week due to the current situation.

As we explained earlier, running productive and engaging online meetings requires deliberate effort, preparation and practice. This is especially true when it comes to engaging and building trust with clients. Now consider this: 77 percent of the respondents in [Deloitte's "Workplace Burnout Survey"](#) said they have experienced employee burnout at their current job, with more than half citing more than one occurrence.

When you couple this with the fact that employees now have double, maybe even triple, the number of meetings they normally would each week, burnout is likely to become more common among employees. The findings from our study support this: 38 percent of the surveyed employees said a full week of virtual meetings leaves them feeling exhausted and another 30 percent feel stressed by the end of the week.

After a full week of virtual meetings, how would you describe your state of mind?



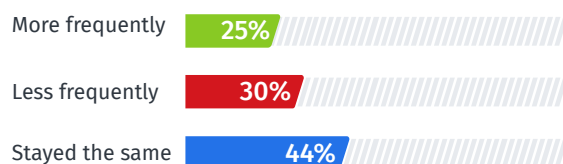
Tips for Monitoring & Supporting Employee Mental Health

- ✓ Everyone in a management position should use one-to-one meetings to check in regularly with direct reports. Use this time to gauge how employees are adapting to the new normal of remote working and determine if they need additional support. Reiterate your support and provide access to mental health programs.
- ✓ Communicate, communicate, communicate as much as possible. Provide short, digestible snippets of information. Make it interactive and incorporate various types of media, such as images, GIFs, presentation slides, infographics and videos.
- ✓ Be vigilant about any behavioral changes that might indicate something is wrong. It could be something as simple as a normally extroverted, talkative employee has suddenly become quiet and less socially engaged. Pay attention to these types of cues.

Client Loyalty Isn't as Fragile or Fleeting as You Think

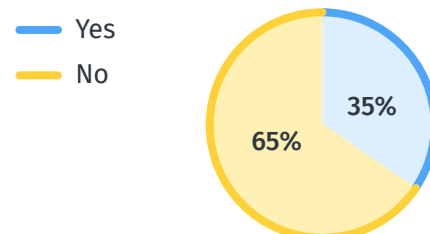
When we asked the respondents if their clients have cancelled online meetings more or less frequently since going into quarantine/working remotely, the answers were somewhat surprising. 30 percent of the respondents said the shift to remote work hasn't made a huge impact on meeting attendance and, in fact, their clients have cancelled meetings less frequently since going into quarantine. Meanwhile, 44 percent said meeting cancellations from clients have stayed the same.

Compared to in-person meetings, have your clients cancelled virtual meetings more or less frequently while in quarantine?



Note: Figures may not add to 100 due to rounding.

Since shifting from office work to full-time remote work/meetings, have you lost any clients?



These findings surprised us for a few reasons. First, the same respondents have already expressed a number of concerns and worries about how the shift to online meetings could damage their client relationships, trust and loyalty. Second, 65 percent of the respondents also confirmed that they haven't lost any clients since shifting from office work to full-time remote work and meetings.

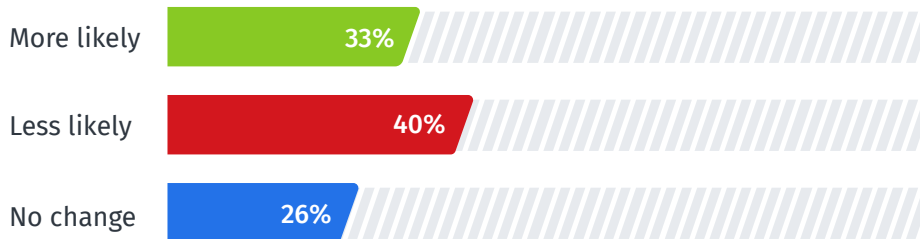
Together, these findings illustrate that client loyalty isn't necessarily as fragile or fleeting as employees (and their businesses) might think. That poses an opportunity to get creative and find new ways of working with clients. It also means taking a proactive approach to communication and using digital tools and channels to share relevant information, provide useful content and deliver ongoing support and guidance during times of change. Most importantly, employees should let their clients know that they are available at any time to chat one-to-one, discuss strategies and act as a trusted advisor.

Even If the Future of Work Is Remote, In-Person Client Meetings Will Always Be In Demand

In the last few months, there has been a deluge of media reports and expert commentary professing that the future of work is undeniably remote. While we agree that remote work is here to stay (and will certainly become more popular in the future), our study reveals a less spoken about fact. No matter how common remote work becomes, there's still no substitute for in-person meetings. In fact, almost half (40 percent) of the respondents said they would be less likely to meet clients virtually once the government-imposed lockdowns and social distancing rules have been lifted.

To us, the findings have a lot to do with the fact that we, as humans, still crave human and personal interactions - both in our personal and work lives. And when it comes to forging and building client relationships, trust and loyalty, in-person meetings can prove invaluable. This won't ever go away.

Once the government-imposed lockdowns and social distancing have ended, will you be more or less likely to meet with clients virtually?



Note: Figures may not add to 100 due to rounding.

CONCLUSION

As our study reveals, there's a great deal of pressure on businesses to keep clients happy, engaged and loyal. In one sense, this is driving employees to be more proactive, organized and creative in how they interact with clients via online meetings. However, it's also pushing employees to their limits, both physically and mentally, as they go above and beyond to be dynamic, engaging virtual presenters and trusted allies.

But as all meetings are now taking place online, it's also causing a significant increase in the number of online meetings being held each week. As a result, employees are struggling with meeting overload, which can leave employees feeling exhausted, stressed and burned out. These feelings can have serious consequences for employees' mental health and well being.

Most importantly, our study reveals a fact that most industry experts haven't discussed. Even if the future of work is automated, digitally-enabled and remote, in-person meetings will always be a vital component in maintaining client relationships.



ABOUT DOODLE

Doodle is the leading enterprise scheduling technology helping the world's largest brands instantly set meetings with clients, colleagues and teams. Tapping into the unique nature of smart scheduling with AI and chatbots, Doodle simplifies the planning of 1:1 and group meetings for busy professionals. As the world's most trusted online scheduling platform, Doodle has more than 30 million monthly active users. Part of the Swiss media company, TX Group, Doodle AG is headquartered in Zurich, with offices in Berlin, Atlanta, New York City and Belgrade.

CONTACT US

To learn how Doodle can help you boost client loyalty and grow your business, contact our sales team for a product demonstration.

If you would like to test out Doodle before committing long-term, you can get started with a 14-day trial.

If you're a journalist or analyst and would like to request more information about this report or speak with Doodle CEO Renato Profico, please contact our marketing and PR team at marketing@doodle.com.

