

**BUILDING FOR
MOMENTUM:
CUSTOMER
EXPERIENCE
IN PRACTICE**

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INTRO INTRO RODUCTION

Customer Experience

If strategy is the starting point for engineering great customer experiences, process is the way to continue that momentum. It's not enough just to create a strategy; you need to put it to use to reap the benefits. From mature customer experience organizations to those just starting, learning which areas can build momentum will impact the entire organization straight to your bottom line.

Internal Process Impacts Customer Experience

When was the last time you had a memorable experience when interacting with a company?

What do you remember most—the feeling that it inspired, the people you interacted with, the ease of the process? This feeling that you're remembering is exactly the one you want your customers to recall when they think about your company, not only because we tend to share positive experiences but also because it means that you delivered a memorable customer experience.

Memorable customer experiences don't occur on their own but rather are the sum of internal processes, technology, and culture. It's the alignment driven by your organizational customer experience strategy and internal processes. Note the word that keeps appearing—process. You cannot deliver effortless customer experiences without internal processes that support and align your organization.

Business process is defined as a collection of linked tasks or activities that accomplish an organizational goal. This could be directly in relation to a customer account or an internal objective that relates to a product. Regardless of whether the process directly or indirectly impacts the customer, it directly correlates to the delivered experience.

Successful customer experiences are linked to **increased revenue, customer retention, and customer satisfaction** meaning that you want to deliver more of them. But you can't do that without improving internal processes. Improvements to processes are not one-off optimizations but rather a continual cycle regardless of your organizational customer experience level.

While internal processes have nuances that are unique to each organization, a few stand out above the rest as key instances where processes can continually be improved and map to increased customer satisfaction and **decreased cost overall**.

Business process is a collection of linked tasks to activities that accomplish an organizational goal. In this case, this is how you use process to enhance customer experiences.

Overall CX Strategy Process Improvements

You may not consider a strategy a process, but, in fact, it is a collection of processes to achieve an objective. In this case, we are talking about how the strategy is delivered throughout the organization and which milestones are utilized to measure progress.

How you implement your strategy internally is just as important as what the strategy contains—strategy is useless without action.

How you implement your strategy internally is just as important as what the strategy contains—strategy is useless without action. The process of how you enact your strategy means aligning departments and the vision with the entire organization, effectively building a customer-centric culture. Customer experience is not limited to customer-facing teams but everyone in the organization from the CEO to interns. This means that everyone needs to be on the same page when it comes to customer experience.



Communication

How you communicate your strategy as well as the progress to implement it matters to everyone in the organization. Continually communicate your overall goals to your organization and what milestones you've set. This aligns expectations and ensures that no one is surprised by new initiatives related to your customer experience strategy.

Training

Enabling your employees for customer experience success means making sure they have the right skills and tools. As your organization evolves, there are additional skills and knowledge that can help enable your staff to better serve customers, which means providing training is important. This doesn't have to be limited to sitting behind a screen or in a classroom for learning, instead consider using lunch and learns, interactive soft skill workshops, and product knowledge training. These areas open up more ways to effectively deliver a customer experience that is memorable.

Milestones

Goals are an integral part of a strategy and to get there, you use milestones. Milestones are the steppingstones to a goal, the culminated effect of multiple smaller actions. As markers of progress and achievement, these milestones make excellent motivators within your journey to CX, but organization leaders must define them. Setting milestones as part of your CX strategy should include the steps your organization takes to enable better CX across the entire organization rather than departmentally. Like your strategy, milestones need to be continually set as they are achieved to continue progress, but they also need to be communicated across the organization.

It's important to note that strategy itself evolves over time which means your customer experience will evolve too. Having the processes in place to align your organization and guide continual improvements, allows you to foster a customer-centric culture.



Journey Mapping and Optimization

Customer experience doesn't start when the sale completes, it starts with the first touchpoint with the customer from marketing. This progresses from the first touchpoint of a prospective customer on the buyer's journey to nurturing current customers within the customer journey. Every organization has a [specific journey for buyers and customers](#) that is unique to their product and services, but these journeys need continual management and improvement like the rest of your business.

Touchpoints

Mapping your touchpoints is a continual process. As your organization adapts to the market or adds additional products and/or services, the touchpoints will change. A touchpoint is any interaction that a buyer could have with your brand—this is a chance for you to employ every logical “what if” scenario and lay them out within a map. You can divide touchpoints into three areas—prospect touchpoints, opportunity touchpoints, and customer touchpoints, allowing you to locate where each of the touchpoints fall within the journey.

Buyer's Journey

The buyer's journey occurs before a prospect becomes a customer. This journey maps the traditional phases including awareness, consideration, evaluation, justification, and purchase but within these phases, are nuances specific to your organization. You should continually map and optimize a pathway for each product or service that your company offers as well as the touchpoints within the phases to ensure that you are providing an optimal experience before the purchase.

Customer Journey

Once an opportunity converts to a customer, they begin the [customer journey](#) with your organization. The customer journey not only encompasses relationship management but also providing resources, customer service, and soliciting feedback. This is where you create customers for life and loyal brand advocates, [reducing customer churn](#), and increasing revenue.

Journeys change and they need continual maintenance which means that having a platform that does the heavy lifting frees you up to focus on the relationships that you need to build throughout it. Customer experience management from start to finish is all about building that relationship, letting the platform do the work of managing the touchpoints.

Mapping out each of these areas is essential to customer experience. Understanding the journey is the way you can walk a mile in your customer's shoes.

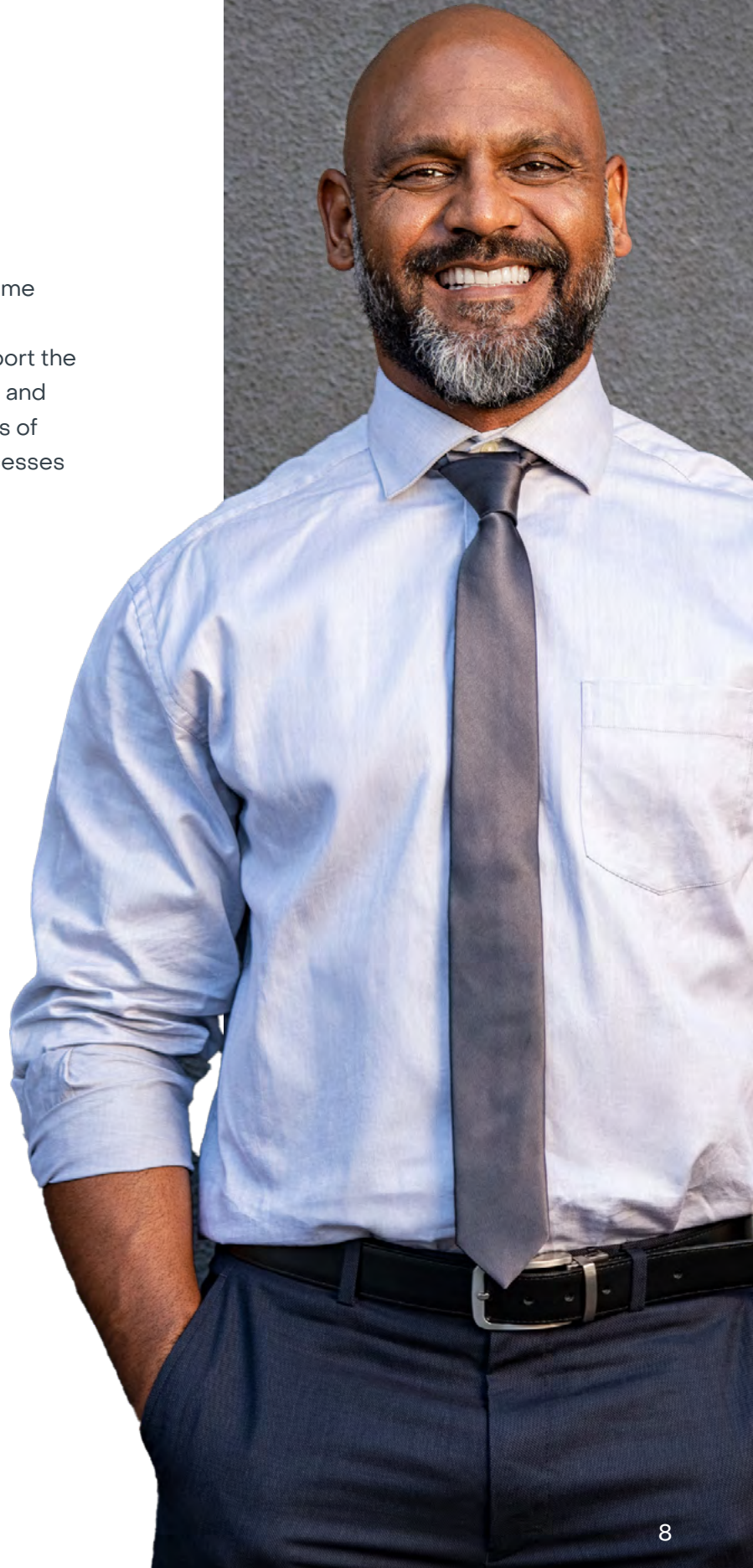


Repeatable Departmental Processes

With touchpoints and journeys standardized, it's time to optimize internally within your teams. Different departments, both customer-facing and not, support the organization at points throughout the sales cycles and customer journey. What occurs during those times of support can be standardized into repeatable processes and should be optimized as needed.

Marketing

What happens when a lead visits a web page and interacts with a form? What occurs when a lead becomes qualified? Each is repeatable and continuous within the marketing domain, and can be aligned to the touchpoints that you have mapped for your organization. For example, once a prospect fills out a form and [marketing automation](#) captures the prospect information, marketing can then navigate the prospect into a nurture campaign, alert the [business development team](#) to a new potential lead, and pass on that lead when it becomes qualified. While this is a basic example of what can occur on a form interaction, [marketing automation is critical](#) to allowing marketers to use their creativity to engineer campaigns while the platform does the work based on triggers defined within the journey.



Sales

What occurs when a lead is marketing qualified and when does it become sales qualified? What is the cadence for reaching out to potential opportunities? Where does the discovery call occur? These actions are specific to sales teams and depend on the lead hand-off, company size, solutions required, and other lead specific details. This is where sales processes need to be optimized so customers are not bombarded with multiple account managers following up on the same opportunity. Routing which opportunities go where needs to be defined and implemented directly within your organization's [CRM solution](#). Having repeatable processes within your CRM allows sales to focus on building [relationships and rapport](#) with potential customers.

Customer Service

What happens after the sale during implementation? Who deals with issues when customers are getting up to speed or something malfunctions? While in a perfect world there would be no issues once a sale is completed, customer service is the driving force behind making sure that your customers have what they need. Support processes including SLA management, customer contact follow-up, and issue management are all enabled through a [customer service solution](#) that helps manage the details while the representative focuses on the customer. Customer service issues directly impact customer experience and need repeatable processes for common issues and escalation management to ensure that each [customer is receiving a personalized experience](#).

Don't just focus on what customers see—every department has a hand in the customer experience.

Non-Customer Facing Teams

When does finance need to approve a new deal? When will legal be able to redline a customer contract for professional services? At what point does the product ship to the customer? Each question applies to specific departments that the customer doesn't see internally but they will absolutely know if something breaks down within them. Utilizing tools like [CRM](#) and [customer service case management](#) can change the game for everyone across the organization, allowing those teams that don't have a direct impact on customers to feel the love of process management and to continuously deliver [effortless customer experiences](#).

Optimizing Departmental Hand-Offs

Once you understand the touchpoints and journeys, you'll have a clearer understanding of who in your organization is interacting with your prospect or customer at each point. Where organizations seem to fumble the most is in the hand-off, which can severely impact a customer's experience. The pitfall to hand-offs is subscribing to the idea that one department owns one touchpoint in the journey. The truth, however, is that many departments may play a crucial role in touchpoint. For example, finance may be involved in the order process, but the salesperson is the one shepherding the prospect or customer through that process. In this example, there is a shared responsibility to ensure the process goes smoothly. How can you optimize the hand-off process? Whether it be from marketing to sales, or sales to support? Figuring out how to make this process as efficient for the customer or prospect will make all the difference.

The departments mentioned are by no means exhaustive and will vary in addition to the three main departments that interact with customers. However, it's important to note that process optimization and standardization must occur everywhere in the organization to deliver customer experience effectively.

Customer Satisfaction

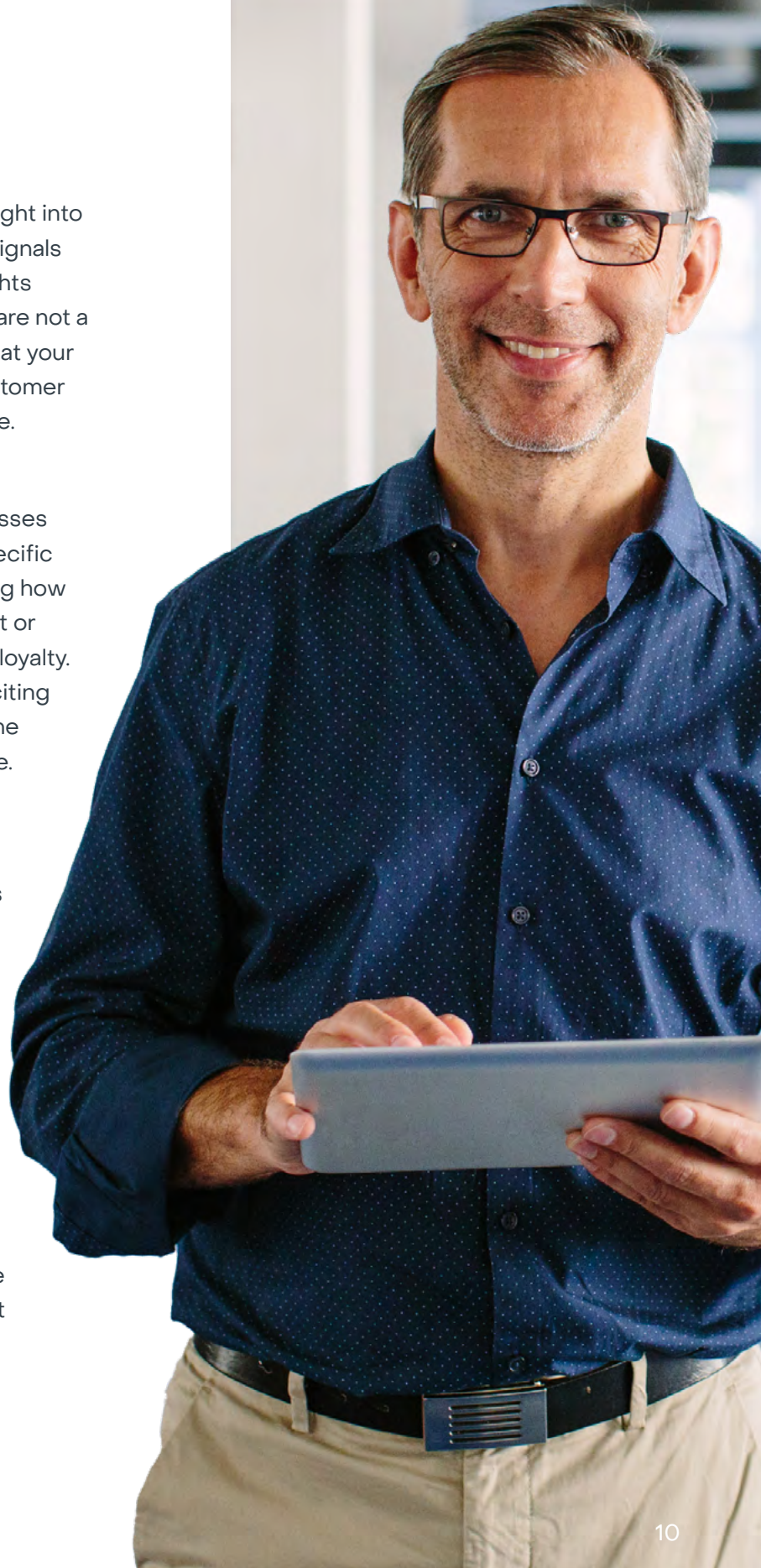
Measuring customer satisfaction can provide insight into your customer experience and provide warning signals of where processes are breaking down. The insights received via this process are invaluable, but they are not a substitute for building relationships. Make sure that your organization is enabled to deliver memorable customer experiences with a [platform](#) that makes it possible.

NPS Measurement

[Net Promoter Score \(NPS\)](#) is a standard in businesses globally to gauge how customers feel about a specific delivery or product. It revolves around determining how likely the customer is to recommend your product or service to someone else at its core—it measures loyalty. Determining what triggers your organization soliciting feedback via an NPS survey is crucial to getting the insight you need to improve customer experience.

1:1 Customer Account Review

Customer service managers and account managers like to review accounts with customers during certain times of the year or renewal process, but have you determined when the optimal review is for your organization? Once a year or quarterly? Maybe monthly? Dependent on your business and product or service, when and how you review accounts with customers should be monitored and reviewed based on the input you receive. Customers like highly-personalized experiences which means that this may vary based on the customer or product. but make sure that you are reviewing accounts so that you're not blindsided if or when customer churn occurs.



Customer Effort Scoring

How much effort is required to have an issue solved? This measures how easy it was for customers to have their issues solved. The higher the score, the more effort required. Since customers crave effortless experiences, it's critical to monitor and improve based on how much effort customers feel they have to put in. Utilizing a customer experience-centric platform makes this a breeze to solicit feedback and the results should directly impact how you enable customers.

If you don't have a process to measure customer satisfaction, you're losing money.

Social Listening

What are your customers saying, both old and new? With the advent of social media and prevalence throughout the business world, it's important to know what's going on especially when it comes to your brand. The sentiment behind what customers are saying on social media and what is being said is important to your customer experience. Social listening allows you to see what customers are saying publicly and address issues as needed.

There are numerous ways to measure customer satisfaction but what's important here is to understand that it must be measured. Customer experience needs continual feedback to work and there are more ways to measure customer satisfaction than just the ways above, but it is absolutely critical to ask and ask continually so that there are no surprises in your customer experience.



High-Definition Customer View

Understanding the nuances of customer experience is crucial in today's business world. Customers expect tailored and highly-personalized experiences which means that you need a full customer picture that is rich in breadth and depth, but also accessible by the entire organization regardless of function. Improving this is directly related to your internal processes and technology.

Data Entry and Quality

There are few things that people hate more than data entry as part of their professional lives, but businesses thrive on data, which means you need to make it work within your organization. To improve the customer experience ensure that the data within your system is accurate and high-quality. Organizations are made up of people, not robots—you're bound to find errors and omissions within the data if you're [solely using your employees](#) for this process. Process improvement in this area starts with selecting a platform that enables you to [source the data](#) that is often reliant on human entry and allows your organization to reconcile data for accuracy easily: Letting the platform enter the data and employees focusing on the insights.

Universal Customer Picture

Regardless of their function within the organization, shouldn't everyone understand everything about a customer for a complete picture? This means that marketing needs to pass on additional interests, customer service should see what sales promised to avoid having blind spots, and sales teams can act on information uncovered during a customer service solution. This means that you need to have [integration for departmental technology](#) to provide a complete customer picture that is universal across the organization.

Historical Context

Additionally important to note when looking for a complete customer picture is historical context. This differs from data quality because this information precedes the customer's current status, including touchpoints, actions, interactions, or anything that might be of note within the customer account. Customers want to know that you know them, and they don't care if the account has been handed off three times over the decade-long span that they have been a customer if you have the context. [Historical context goes beyond](#) and allows your organization to understand the history of interactions with customers without the need to have additional conversations or worry about lost information when someone leaves an organization. That added element of time is important to customer experience to provide context.

Having a view of customers that is complete and accurate means optimizing processes for data entry and the your internal steps to have a full customer picture. Having a platform that does the work for you, allows to to have a high-definition customer picture whenever you need it and readily surfaces the information you need when you need it.

IMPROVE

Continual Improvement Refines Customer Experience

How you enable great customer experiences is highly dependent on the choices that you make internally and the processes that you employ. Customer experience is a journey. The destination filled with happy customers that keep coming back creating recurring revenue. Starting your customer experience internally is only half the effort, now it's time to optimize internally but you don't have to do it alone.

When you let the platform do the work, you enable outstanding customer experiences.

SugarCRM is how marketing, sales, and service teams finally get a clear view of each customer's journey, without getting all the headaches and hassles that come with traditional CRMs. With SugarCRM, you let the platform do the work.

[GET DEMO](#)

About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow [@SugarCRM](https://twitter.com/SugarCRM).