DRIVING MEMORABLE CUSTOMER EXPERIENCES WITH TECHNOLOGY

HD-CX Customer experience like you've never seen.

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Introduction

Technology is essential to organizations but it often can feel like a roadblock to productivity when internal tools don't work correctly. Your organization needs to be enabled by its technology to reach a high-definition customer experience and eliminate the road blocks, blind spots, and busywork that comes with the wrong solutions.

sugarcrm | **Let the platform do the work**

Shift Your Thinking

Technology—we can no longer live without it, but the thought of implementing another business solution can make leaders audibly groan. It's time to shift gears away from thinking of business technology as a headache and high-maintenance investment and put your organization in the driver's seat. Technology is essential for customer experience and plays a crucial role in enabling your organization to deliver an effortless experience.

The key? You need to have the right platform with robust and modern technology that:

- Functionally supports its business purpose
- Is easy to adopt and use
- Integrates with other software/platforms
- Is secure and available anywhere

The list above is far from a complete list, but rather the features you should expect with any technology you use.

> **Did you know that sales only spends 54% of their time selling? The rest is eaten up by administrative tasks that have to do with maintaining broken systems meant to enable them.**

Does your current internal technology check all the boxes? Three? Two? If not, it's time to re-evaluate. The reality of business technology must change, and here's why:

- 61% expect technology to be down as part of their everyday working experience
- Businesses lose up to $1.8 billion per year on lost productivity due to technology, whether through tedious data entry or legacy systems
- 8% of software is only accessed once per month
- 35% of employees use technology not authorized by IT to do their job daily

These statistics portray a dim reality for businesses because there's a breakdown between cost, usage, and availability. This is precisely why whatever business technology you choose must fit the list above.
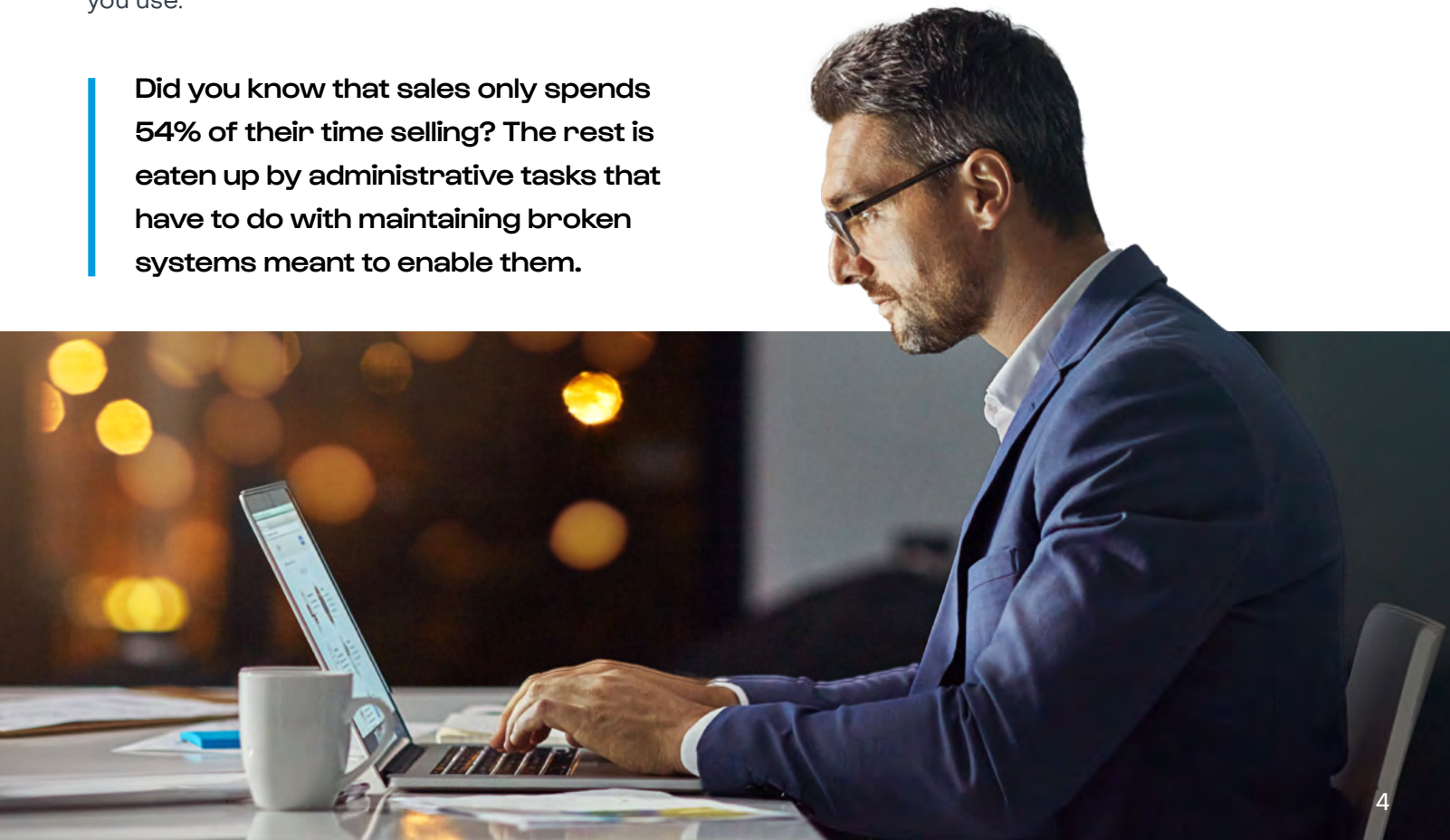
Navigating to an Effortless Customer Experience

The question now is what technology is essential to enabling customer experience within your organization. Every organization has different needs depending on its vertical and customer base, but there are a few central building blocks to a great customer experience.
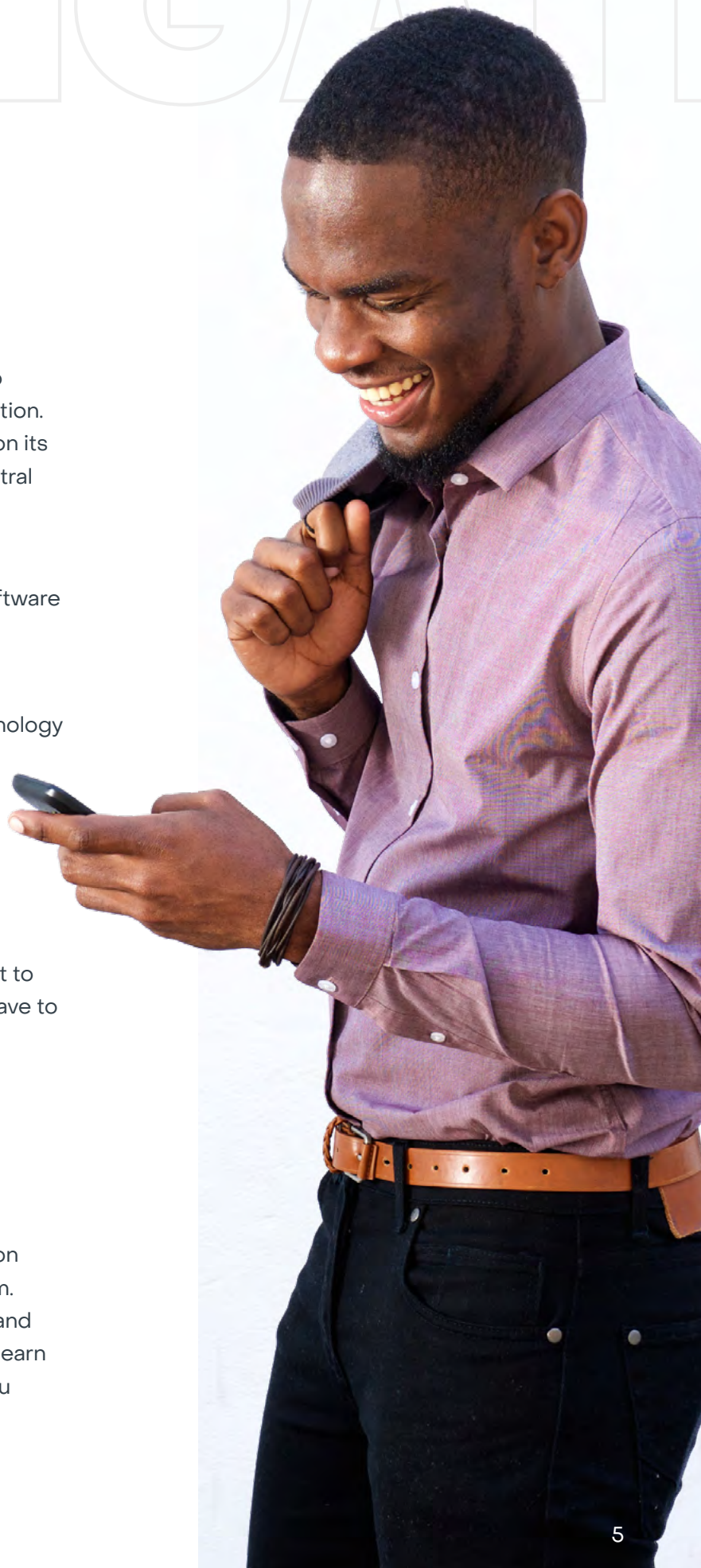
- Communication and Collaboration Software
- Customer Relationship Management (CRM) Software
- Marketing Automation
- Customer Service Software

These are the four main building blocks of the technology that enables customer experience because they follow through each touchpoint with the customer throughout the organization.

But with every software on the market, it's challenging to narrow down exactly the right platform and necessary features to enhance your customer experience. Because of this, it's important to look at these features that the technology should have to enable your organization better:

- Artificial Intelligence
- Predictive and Revenue Analytics
- Cloud Computing
- Security

Each of these features is critical for your organization to remain relevant and grow alongside your platform. It's time to understand why each of these features and technologies is important to your organization and learn how to choose a platform that does the work for you without the noise.

Accelerate with Communication and Collaboration Tools

Communication in an organization can never be understated; it's at the core of every business function. If communication breaks down at any point, organizations will feel the pain and bear the cost.

While it may seem like an unnecessary highlight to reference the technology your organization uses internally to communicate and collaborate, it directly impacts the customer experience. Today's average business has roughly 129 applications internally, and that number is on the rise. More noise, more grabbing our attention, and varied communication methods, which span most of the software that we use—making it difficult to know what to use and where.

 When employees feel connected, they are 25% more productive. However, 74% of employees report that they feel out of the loop within their organizations. The disconnect here comes from the noise and a lack of communication strategy within their business or failure to communicate it if there is one. But it comes down to businesses needing to standardize the tools they use to communicate internally and collaborate for an effortless customer experience.

Customer experience starts internally, even with teams that do not interact with customers. For example, if accounting doesn't know about the discount given to a customer and produces an incorrect invoice, that breakdown between sales and finance is felt by the customer even though the customer isn't privy to what is occurring internally. This means that the breakdown directly affects the customer experience and thus your bottom line.

Communication and collaboration tools are essential technology to your customer experience. Here are features that you should be looking for when selecting the tools the entire organization will use:

- Integration with Key Technologies: Integrating your communication tools like chat or email with CRM is essential to productivity. It also enhances the customer experience, ensuring that even the most minor details are included within the contact record. Look for tools that directly integrate and sync seamlessly with essential business technologies.
- Mobile Availability: As we move around and work from anywhere, technology needs to translate to our mobile devices. Mobile availability of communication and collaboration tools makes sure that people can communicate on the go and receive the updates required.
- Usability and UX: There are few things more aggravating than having a powerful tool with a poor interface and issues that interrupt business performance. Ensure that the tools you select to support communication and collaboration are easy to use and designed to be intuitive, making it a breeze rather than a chore to communicate.

The critical idea here is your entire organization needs to utilize the same core tools for communication, including chat, conferencing, and email. Geographic regions are an additional consideration for tool availability, but often tools are available worldwide. Make sure that your technology enables your organization to accurately communicate to increase productivity and provide effortless experiences.

Communicate within your organization and set the standards to develop a collaboration and communication strategy. You'll be ahead of the 60% of businesses that don't have one—and, more than likely, they're your competitors.

Put Relationships in the Driver's Seat with CRM

Your CRM is the foundational tool for superior customer experience. Historically, the challenge was CRM either couldn't or wouldn't use it because traditional systems were not user-friendly and could be overly complicated. But modern CRM has come a long way—and it's time to take a new look at what it can do for your business. The best CRM solutions are easy to use yet comprehensive in scope—turning every employee into a customer expert by putting the correct information at their fingertips, often before they even ask for it.

It's no longer enough to provide the best product or service—customers want the best experiences and the most convenient buying processes meaning that you need a CRM to match. Organizations must deliver solid first impressions and repeat that performance with consistency and excellence at every stage with a commitment to providing a customer experience that is consistently better than your competitors' at every touchpoint. CRM platforms are a vital platform for customer-first transformation; a modern solution will help you capture relevant insights about your customers and share the ideas with employees who can then act on them. This process delivers positive experiences and drives significant productivity improvements.
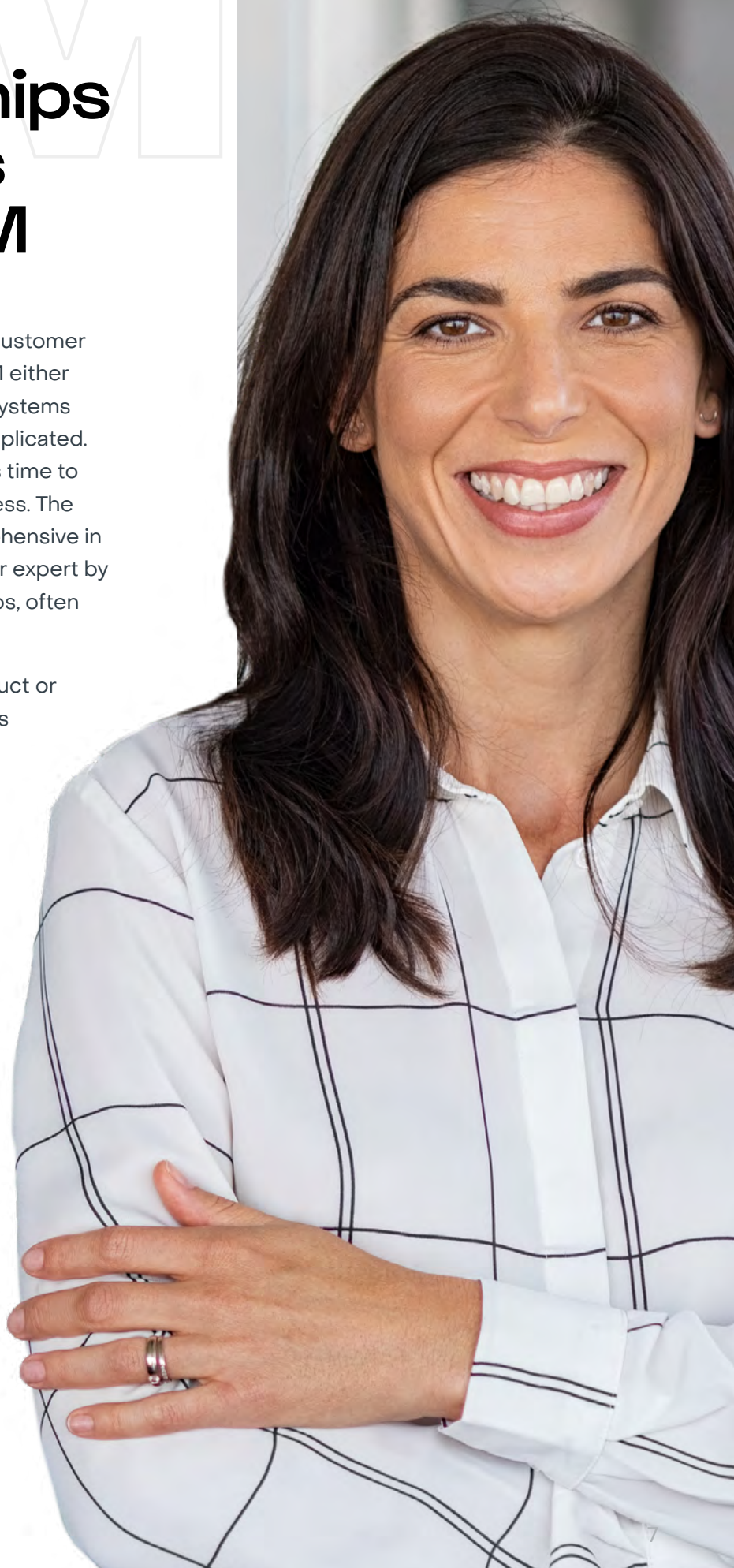
An end-to-end CRM system is a real solution: It is extensible and supports various tools and technologies as part of a broader customer engagement ecosystem. However, the breadth of options and extensions can be overwhelming when shopping for a CRM solution. There are three main areas that your CRM needs to drive customer engagement within your business:

- **Sales Enablement:** Sales needs to be able to use the CRM solution for more than lead monitoring—it needs to provide an intuitive experience, that highlights the needed information for a complete customer picture. Low adoption rates can plague CRMs because they are clunky, poorly built, or legacy systems. Ensure that the CRM isn't a roadblock preventing sales teams from closing opportunities.

- **Workflow and Process Management:** Your buyer's journey, customer journey, and processes are tailored to be unique to your organization which means you need the workflows to match when it comes to your CRM system. Don't rely on cookie-cutter approaches; they can provide the outline but will not be 100% applicable to your organization, meaning that you need additional ways to customize your workflows and journeys that fit.

- **Time-Aware Insights and Analysis:** Understanding what is going on, when, and where it is critical to the customer experience because it allows you to highlight accounts most likely to close and customers in danger of churning, which costs mid-market businesses $5.5 million each per year. Adding the additional parameter of time ensures that you don't have blind spots and can see a complete picture of your pipeline and forecast accurately—an essential insight for any sales team.

CRM should work for your organization rather than against it, letting your employees focus on relationships. Relationships are at the heart of customer experience, and a genuine CRM worries about the data and removing the busy work that separates sales professionals from building meaningful customer relationships. When CRM works for you, you see an accurate 360-degree picture of the customer which lets your team personalize experiences and outshine the competition. The essentials checklist features the absolute minimum your CRM system must have.
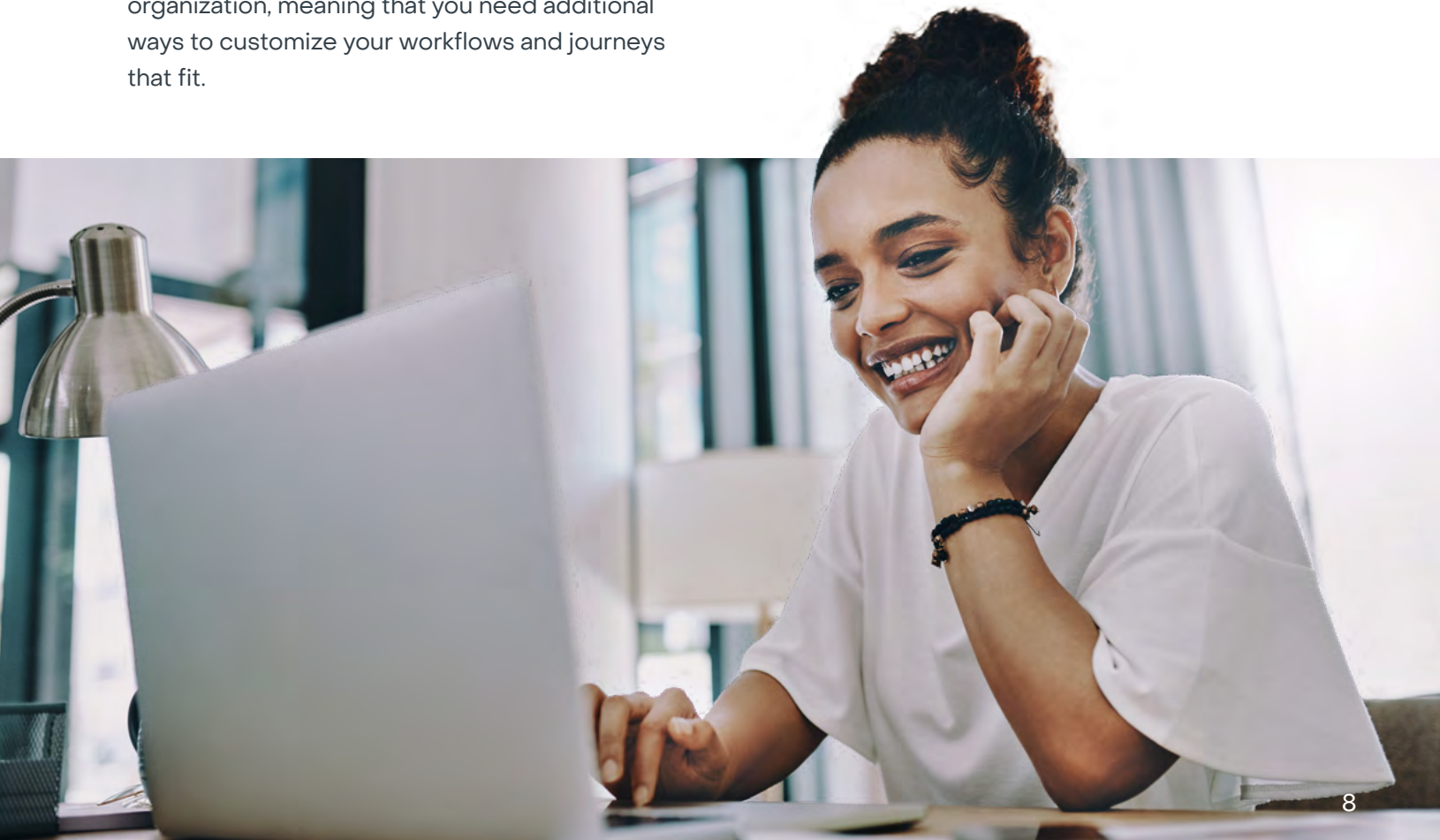
CRM Essentials
CHECKLIST

☐ Lead Management

☐ Workflow Automation

☐ Revenue Analytics

☐ Customer Journey Mapping

☐ Integration Capability

☐ Sales Forecasting

☐ Advanced Reporting

☐ Relationship Intelligence

☐ Automated Data

☐ Quote Management

☐ Business Process Management

☐ Customization Ability

☐ API/Code Access

For a complete CRM checklist of what you should look for when engaging with a new vendor, download the free resource here.
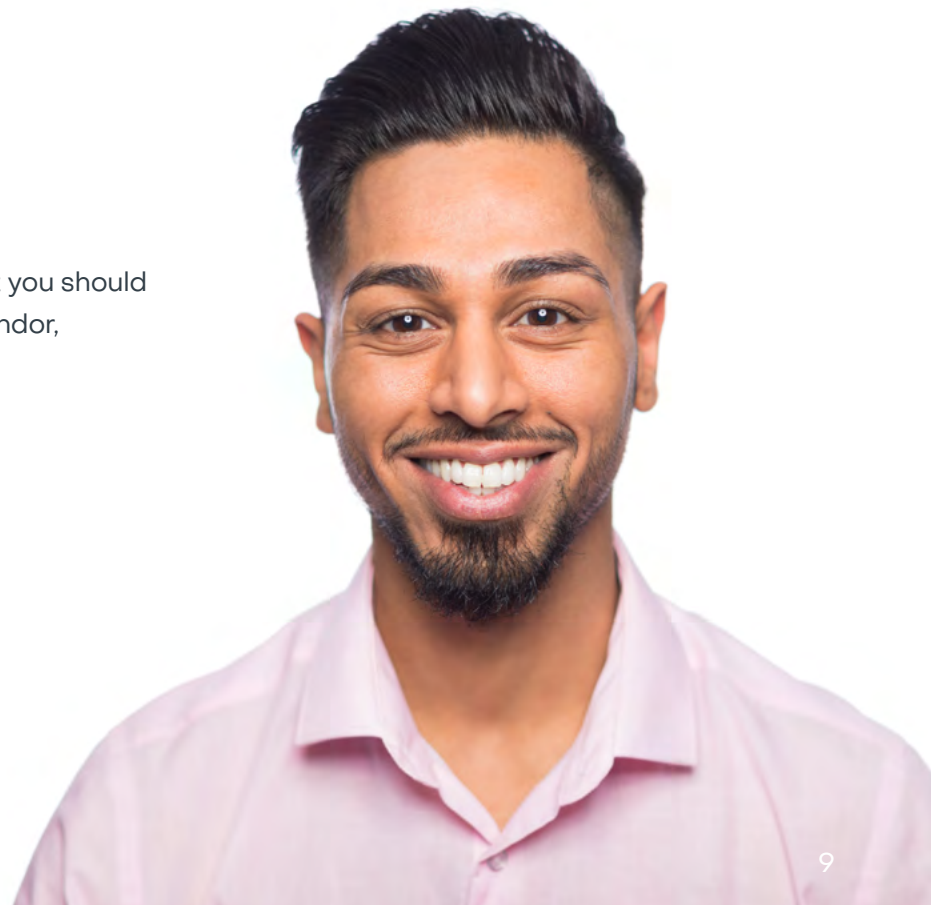
Rev-Up Your Personalization with Marketing Automation

Marketing automation is the secret weapon of any marketing team, the magic that makes campaigns flourish—the infusion of high-octane fuel to any demand generation engine. Often, marketing is the first introduction that potential customers have to your brand and what brings them in the door, so you want to make this first impression a spectacular one.

Marketing automation is confused as just email marketing, but it's far more than that, including lead scoring, nurturing, website traffic analysis, landing pages, and forms (to name a few). When evaluating marketing technology, marketers may notice that business size receives a lot of attention, directed at an enterprise or small business. This gap makes marketers feel that they need to choose between software affordability and available features. But a robust marketing automation platform does not mean choosing between features and price, just evaluation and finding the right one for your organization. The important thing for any business to realize is that every marketing automation platform should provide a set of core features, driving not only volume but also velocity to your sales pipeline.

Customer experience is significant not only to sales but marketing as well. While marketing can serve as the first touchpoint in the buyer's journey, it can also help accelerate the sales process, while maintaining customer relationships through enabling sales and customer service. Marketing plays a more significant part in many organizations than people realize and with more and more customers having higher personalization expectations, there's added pressure on marketing to deliver the best. That best is only achievable with marketing automation—allowing you to better personalize the customer experience but contend with competitors and achieve your growth objectives.

When it comes to marketing automation, it doesn't matter if you are implementing a first-time solution or switching from a legacy platform. It is essential to assess your company's needs and identify the project drivers before investing in any technology change. That means evaluating what support and features your organization needs and the key processes marketing automation will support. However, there's a list of essential marketing automation features every company should consider when evaluating new marketing software.

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Marketing Automation Essentials
CHECKLIST

- ☐ Website Visitor Tracking
- ☐ Email Builder
- ☐ Landing Pages
- ☐ Forms
- ☐ A/B Testing

- ☐ Custom Lead Scoring
- ☐ Trigger-based Nurtures
- ☐ Custom Dashboards
- ☐ Advanced Reporting
- ☐ Native CRM Integration
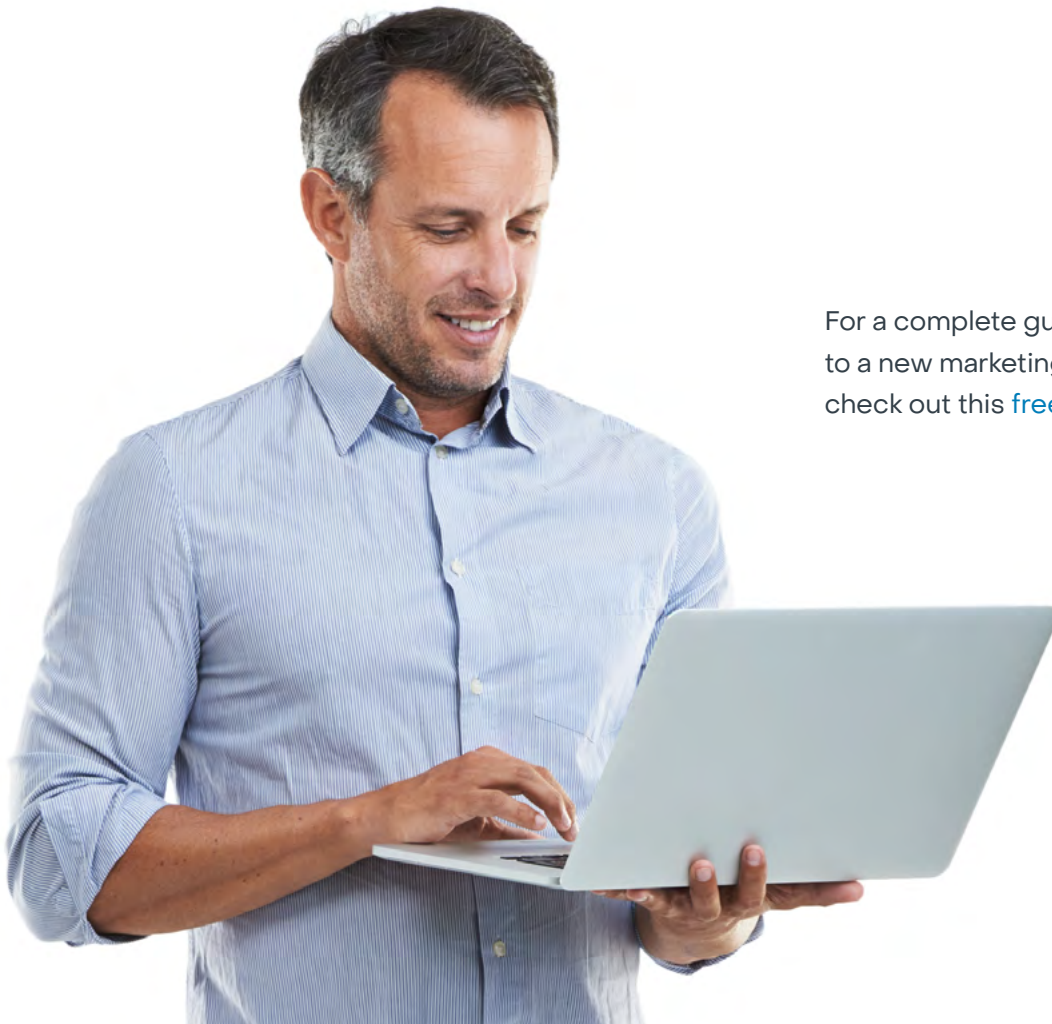
For a complete guide to selecting and moving to a new marketing automation platform, please check out this free resource.

Tune Up the Experience with Customer Service Technology

Without the right technology, meeting customer expectations is virtually impossible. Just as companies invest in sales software and marketing tools; customer service technology plays an equally critical role in the customer journey. Perhaps even more so because customers leave brands when they feel they aren't cared for once the deal is signed. With customer churn becoming more and more of a problem for businesses, organizations need to focus on the customer service aspects of their business as more than a cost center but rather a customer experience diagnostic center.

While customer service teams can utilize a CRM for service, it isn't built or optimized for customer service agents making their jobs harder. Having software specifically dedicated to customer service not only makes it easier but streamlines processes, decreases response times, and customer experience optimization. Having a dedicated customer service software matters—customers are four times more likely to leave for a competitor if the issue they face is customer service based, and ignoring it could drastically eat away at your bottom line.

Organizations who focus on the customer experience throughout the entire customer lifecycle, including customer service, will see customer retention rates increase, creating a return of 25% to 95%. How you enable your service teams to succeed matters, and it's important to get ahead of the competition with a dedicated tool. But what should you look for in customer service software?

Here's an overview of the most essential features:

- **Self-Service Tools:** Customers want to solve problems themselves if they can, and self-service portals are easy ways to help your customers. Additionally, this helps service teams focus on the most pressing issues rather than common issues. Self-service portals allow representatives to quickly and seamlessly add, remove, and edit content to a knowledge base vital to enabling customers.

- **Omnichannel Engagement:** Customer service does not just occur via a single channel, meaning that customer service agent has their work cut out for them. It's challenging to manage multiple channels of engagement, and cases are likely to fall through, causing frustration and lost revenue. A customer service software that utilizes omnichannel capabilities monitors every avenue so that customer service agents can focus on resolving issues.

- **Customer Experience Intelligence:** Like this entire guide, it's not enough to commit to customer experience, but rather something organizations must continually invest in internally. Understanding customer support cases, omnichannel sentiment, and customer profiles allow organizations to deliver personalized experiences and further their customer experience strategy.

These basic features are what power your customer service agents to enable great customer experiences. But they aren't the only essential features of customer service software, and internal alignment with key stakeholders will shed light on the additional elements needed to implement and align with your customer experience strategy. When evaluating a new solution, be sure that you check off the essential features which will empower your organization to create loyal customers.

Customer Service Essentials
CHECKLIST

- ☐ Intuitive Service Console
- ☐ Self-Service Tools
- ☐ Omnichannel Engagement Capabilities
- ☐ Customer Experience Intelligence
- ☐ Customer Service Analytics

- ☐ No-Touch Information Management
- ☐ Case Routing and Management
- ☐ SLA Management

For a comprehensive overview of customer service and how you can enable outstanding customer experiences, download this free resource.
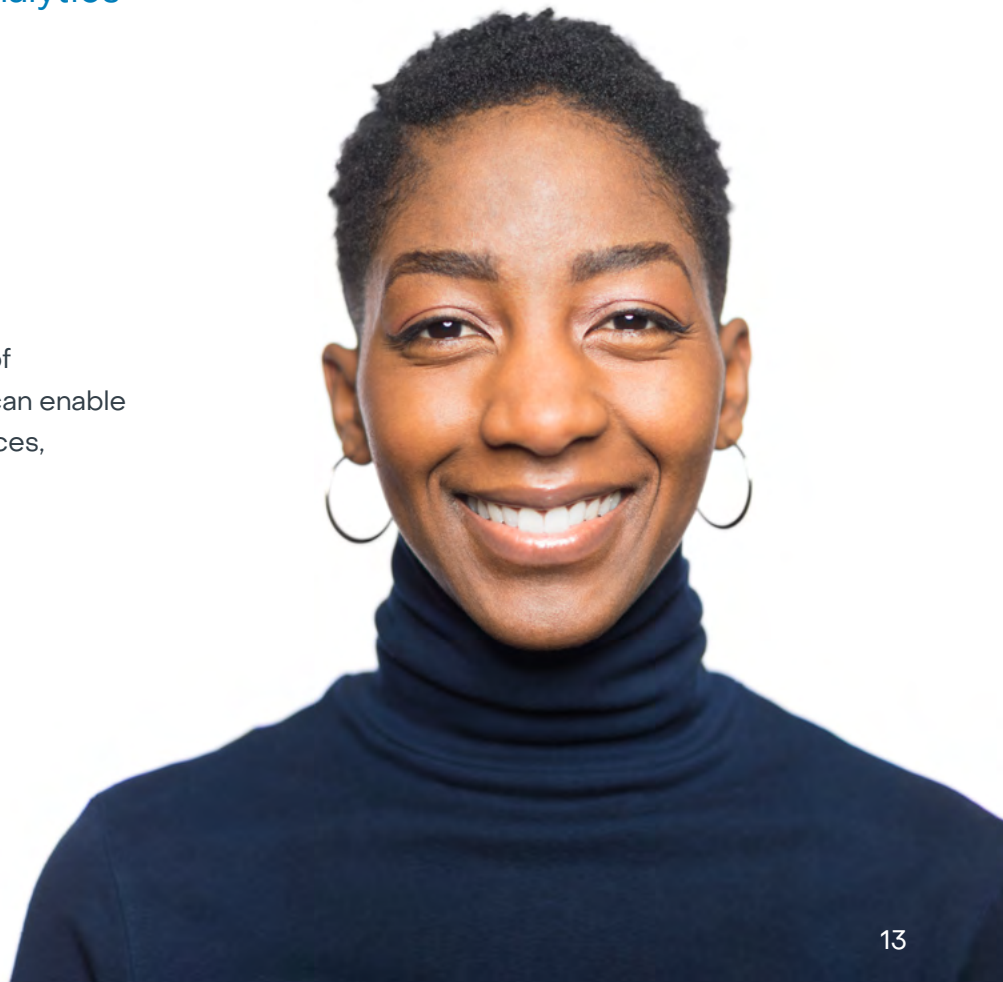
Diagnostics: Understanding the Features under the Hood

Thus far, all of the technologies covered are essential to enabling customer experience within your organization, each featuring throughout or at a certain point within the customer journey. But as technology innovations increase, it's important to know what features are essential for aiding your company's long-term growth.

☐ Artificial Intelligence

A revolutionary new way to enhance the way we approach data, artificial intelligence (AI) is the feature you should look for in a new solution or platform. AI is a game-changer for the data within your business systems in multiple ways. The simplest of which is process automation—taking information from one place like email and inputting it into a contact record within CRM or marketing automation. But it can do more, including detailed data analysis and insight extraction or machine learning-enabled cognitive activities.

As technology evolves to include AI within its core capabilities, it's a must-have feature within each solution you have within your business. If it's not there yet, make sure it's on the roadmap. The vital thing to recognize is that AI capabilities do not replace humans despite the common belief. Rather it allows employees to focus on what they are good at—building relationships and creative problem-solving. A solution with AI incorporated can elevate your business and provide a distinct competitive advantage in customer experience.

☐ Predictive and Revenue Analytics

Dovetailing off of AI, predictive and revenue analytics are also something that solutions should offer your organization—at least when it comes to CRM. It is the data analysis area of AI, where machine learning utilizes algorithms to extrapolate insights from the raw data within your system. These insights provide a better target for potential revenue and predictions on customer actions and deal closures learned from the patterns within your systems to increase accuracy. This highly personalized analysis of your internal data provides a distinct advantage over the traditional data analysis that mainly occurs outside of the system. Instead, the predictions and analysis are shown within the system, benefiting both leaders and end-users.

Customer experience benefits from this information by allowing organizations to contact customers at the right time and at the right point during the customer journey, creating a highly engaging and personalized experience for the customer and tailors the buyer's journey. Customers look for ease and convenience when interacting with businesses, and this provides an internal focus that yields external rewards.

Cloud Computing

Business is no longer done within the four walls of an office but instead across the globe in various settings. This means that your systems need to be connected and readily available no matter where your employees conduct business. Cloud is the way to enable connectivity, providing instantaneous data sync without missing a beat. Additionally, it's flexible to what you need and provides redundancy for crucial information storage, making sure that you don't lose time chasing corrupted information. Most solutions will offer cloud computing capabilities; however, it's important to note that many legacy systems, including marketing automation and CRM, can rely on on-premise installations, making it costly and cumbersome to access data if you're outside the main site.

Cloud computing aids the customer experience by allowing for easy-to-access information no matter where employees are. This means that they will be rarely delayed receiving crucial customer information required for personalized case management and can work on the customer's schedule instead of inconveniencing them. Cloud-enabled solutions allow your organization to better meet customer expectations with ease, thus enabling effortless experiences.

Security

It can sometimes feel like the more connected we are via technology, the more vulnerable we are to hacking and phishing attempts. While connectivity makes those intrusions a possibility, technology continually seeks to combat unwanted access to critical business systems, and in any solution your organization uses, it's a must. When selecting a solution for your business, make sure that you consider the security features of the sales, marketing, or customer service software. While employees are the front lines of defense, your systems should also hold the line to protect your business from unwanted intrusion and data breaches.

How does this relate to customer experience? When they do business with you, customers expect that your organization is protecting their information just as you would your own. That trust is something that you don't want to betray in customer interaction because it's imperative to the customer experience—customers who don't trust you will not repeat business, nor will they keep quiet with their dissatisfaction. Bad news travels fast, so when it comes to security, make sure that no news travels for the wrong reasons and keep your software and customer information secure.

These features make your customer experience easier to implement throughout the right solutions within your business and make sure that you can grow alongside any solution that you choose. When you're considering a new option, make sure that you ask about the product roadmaps to understand how it will further support your growth and enable you to provide better customer experiences.

CONCLUSION

Customer Experience Victory Lap

Customer experience is enhanced by technology if you have the right tools within your organization. It's essential to maintain the right systems for your internal teams to support delivering experiences that make customers feel priorities and deliver effortless 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**.

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