

The Customer Experience Buyer's Guide

Everything You Need to Know to Create Outstanding Customer Experiences



Customers decide your fate

And their expectations are evolving — fast. Having the right customer experience strategy in place will help you get (and stay) ahead. Here's what you need to know to cultivate customers for life.

We get it. Really, we do. It can be tempting to assume that only the world's most colossal companies with the biggest budgets can truly shine at customer experience.

Don't buy into this idea.

With the right strategies and technology in place, it's possible for any business to provide extraordinary experiences again and again — at every interaction, to meet any expectation. The more empowered you are to anticipate and fulfill needs, the better positioned you'll be to create customers for life.

That's what this eBook is for. We'll show you:

- How to gain a competitive edge by building a strong customer experience strategy
- Essential tools and technologies you need to stay ahead of the latest trends
- Critical components to give you a big competitive edge
- Best practices you can use to cultivate customers for life

Contents

Competing in the Era of Experiences	03
What is CX — and Why do you Need it?	05
Essential Building Blocks for CX Success	07
Next-Level Strategies to Future-Proof Your CX Platform	09
Getting Started with CX	13
Conclusion	15
About the Authors	15



Competing in the Era of Experience

Remember when companies could compete solely on price?

Once upon a time, consumers flocked to big box retailers for unbeatable steals and deals. They turned to e-commerce giants to beat the prices they were seeing in-store. They even embraced airline offers when spacious seating and creature comforts were traded for no-frills flying options. And in the business world, buzzwords like “freemium” began to take hold.

These strategies worked really well. For awhile.

Then suddenly, things changed.

First, Walmart shelved its “Always Low Prices” slogan after 19 years. Then Amazon ended a longstanding price parity policy, freeing its third-party sellers to list products at whatever price they chose. Tech companies, meanwhile, began to prioritize enhancements instead of handouts. Across industries, companies became more concerned with creating value and building relationships than simply pushing promotions.

These shifts reflect an important trend — one that’s been growing steadily and will continue to gain steam for many years to come.

People are no longer looking for the lowest price or the best deal.



Across industries, companies became more concerned with creating value and building relationships than simply pushing promotions.



80% of customers think businesses should provide personal experiences, are willing to pay higher prices for a better experience, and are more likely to make a purchase after a personalized interaction.



81% of companies will soon be competing mostly or completely on the basis of customer experience.



7/10 customers will end a business relationship after one poor customer service experience.

TODAY'S CUSTOMERS WANT THE BEST EXPERIENCE

Businesses are now competing in a culture of connected customers, where alternatives to your products and services are a mere click, swipe or voice command away. Mobile technology, artificial intelligence and other innovations have put an endless array of options, quite literally, at people's fingertips.

The result is a surge in expectations across the entire customer lifecycle, from first touch to post-purchase:

80% of customers:

- think businesses should [provide personal experiences](#)
- are more likely to make a [purchase after a personalized interaction](#)
- willingly [pay higher prices for a better experience](#)

But as many as seven in 10 customers will:

- end a business relationship after one [poor customer service experience](#)
- take their business to a competitor after a negative interaction

The stakes are high, to say the least. Fail to deliver on these demands, and the chaos of damaging reviews will ensue. But exceed expectations, and you'll create customers for life. It's little wonder, then, that 81% of companies will soon be competing mostly or completely on [the basis of customer experience](#).

The question to ask is:

How do you stay ahead in this new era of experiences and expectations? The answer lies in your customer experience strategy.



What is CX — and Why do you Need it?

Today's fastest-growing companies understand that success can no longer be built one offer at a time. Rather, they're creating entire customer journeys around an array of individualized experiences. They're equipped to resolve issues in an instant, without the need for multiple calls and emails. They know how to personalize communications and can customize offers down to the individual's exact interests. Most importantly, these companies know their customers well and are able to anticipate needs before people even realize they have them.

In other words...

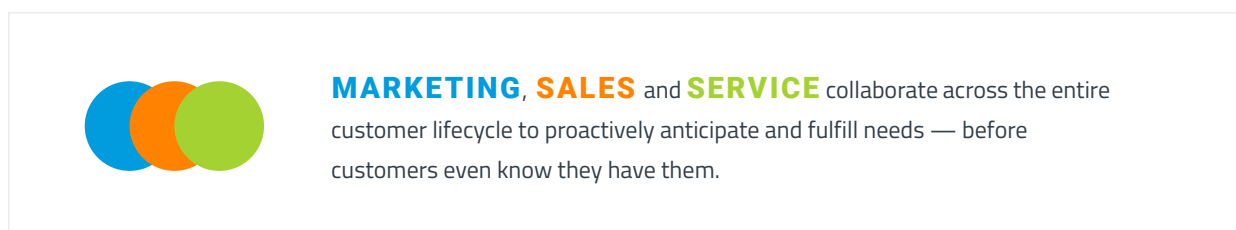
They excel at customer experience, also known as CX.

CX is a holistic approach that allows your company to focus on building relationships instead of pushing products and prices. It's used to unite teams that tend to work independently — namely in marketing, sales and service — so you can turn every touchpoint into an experience, and make each moment more meaningful and memorable.

YESTERDAY'S MODEL: MARKETING-SALES-SERVICE APPROACH



TODAY'S ERA OF EXPERIENCES: CUSTOMER EXPERIENCE MANAGEMENT



This process may sound simple on the surface: Unite teams, get to know your customers and then create personalized experiences. If only.

Fact is, managing experiences across the entire customer lifecycle, with input from numerous key players, has proven to be an elusive process for numerous organizations. Many companies think they're meeting consumer expectations, but in reality still have a long way to go. In one survey, almost half of marketers in the U.S. [claimed to deliver an "excellent" customer experience](#). But fewer than a quarter of consumers agreed. Similar sentiments were expressed in the UK and Canada.

When a business tries to go to battle with an underdeveloped strategy or underperforming CX platform, the results can be devastating. One [customer experience expert](#) put it this way:

"More often than not, employees in one department don't even know the employees in other departments, let alone use data that spans the organization. This often results in wildly inconsistent customer experiences that make companies look disconnected and unfocused."

That analysis may sound dire, but there is a silver lining:

Once you discover how to provide a customer experience that's consistently better than your competitors' at every touchpoint, it can become remarkably easy to create customers for life.



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Essential Building Blocks for CX Success

To thrive in today's environment, you need to:

- Anticipate and fulfill customers' needs before they even realize they have them
- Free Marketing, Sales and Service to focus on people instead of processes
- Unite frontline employees to put customers at the center of everything

So... how do you manage the customer experience — without overwhelming teams or overblowing your budget? It all comes down to your technology.

Based on our experience with more than 2 million frontline employees in 120 countries, there are several must-have essentials that every business needs to survive and thrive in today's environment.

THE ESSENTIALS

MARKETING	SALES	SERVICE
SEO and social media tools that show which campaigns, networks, profiles and posts resonate most with potential customers	Sales forecasting that makes it clear who, when and how customers are moving through your pipeline	Service console that guides each agent to the next best action
Lead nurturing designed to help you send the right messages to the right prospects at the right times	Workflow automation that makes it easy to route leads, generate email templates and more	Self-service portal where customers can get answers themselves
Lead scoring that lets you send only the most qualified prospects to Sales	Relationship intelligence that eliminates the need for manual research and data entry	Workflow automation that allows you to route each case to the right person
Advanced analytics that show which marketing activities are leading to actual revenue and relationships	Customer journey insights that equip each rep to deliver the right messages at the right times	Robust knowledge base that's easy to update and populate with timely articles
Deep integrations between your marketing automation platform and CRM to keep Sales and Marketing in close contact	Email integrations that put important information and insights inside each rep's most-used app	Real-time reports that alert you to problem areas before they become full-blown issues

However, this is just the start. With the customer experience landscape changing constantly, you need to be ready to meet expectations as they evolve. Which means you'll need to future-proof your CX platform, too.

Next-Level Strategies to Future-Proof Your CX Platform

THREE KEY PILLARS FOR LONG-TERM DURABILITY

Here's a story that will probably sound familiar...

Imagine that you just invested in a new platform. You trained on it. Learned the basics. Explored some key features. But when you finally go to use it, you discover that many of the things you need to accomplish can't be done — at least, not without some serious workarounds or help from IT.

If this hasn't happened to you yet, make sure it never does.

We've heard a few horror stories from businesses that failed to future-proof their CX platforms. For example, one company invested a lot of time and resources to customize its software — only to get slapped with a \$20,000 bill when it came time for an upgrade.

If you want to avoid a similar fate, you'll need to focus on more than just the essential features and functions. It's equally important to ensure the technology you use to manage customer experiences is designed to scale and grow with you.

Whether you're looking to enhance existing software or adopt a new platform, here are three key pillars to incorporate.

THE PILLARS



**HANDS-FREE DATA
COLECTION**



**USABLE CUSTOMER
INTELLIGENCE**



**CONTINUOUS CLOUD
INNOVATION**

1

HANDS-FREE DATA COLLECTION

Your company needs customer data. A lot of customer data. That's a given.

But tracking down the RIGHT customer data and keeping it updated? This is often easier said than done.

The sad fact is that less than half of companies are effective at providing complete and accurate data to employees. Just 42% can convert the data they do have into insights that let them [act quickly on customers' needs](#) and interests.

Thankfully, there is an easy fix.

The key is to leverage technology that does all the heavy lifting for you. Look for applications built to capture mission-critical information on your behalf — from emails, texts, social sites, third-party applications and more — and automatically update your database at regular intervals.

This approach will ensure your frontline employees always have the exact information they need, right when they need it. The less time employees spend searching for information and updating your database, the more time they'll have to surprise and delight customers.



USABLE CUSTOMER INTELLIGENCE

It's one thing to have solid customer data. It's another to put it to great use. After all, your data is only as effective as the insights you can glean from it. So until you get good at extracting actionable intelligence, your customer experience will continue to be mediocre at best.

The good news? Advancements in artificial intelligence and machine learning are making it easier than ever to get the full story on your customers' journeys. Just think: Instead of having to hunt down information to craft an email or make a call, the data comes to you. And not just in piecemeal bits and bytes, but as a 360-degree view of the entire customer lifecycle.

For example, consider a typical approach to customer support. The customer submits a request, then an agent responds in-kind. Support tickets are typically prioritized based on the order in which they're received or the level of significance.

What if, instead, those same support requests were prioritized based on sentiment? In this scenario, important data points, such as the words customers use in emails and the messages they post to social media, are used to reorder inquiries. Agents know exactly which at-risk requests to prioritize, and have all the information needed to meet needs quickly and effectively.

And that's just one example among hundreds. Actionable customer intelligence makes it remarkably easy to see which marketing campaigns are generating sales, what types of sales communications are working and so much more.



CONTINUOUS CLOUD INNOVATION

The customer landscape will only continue to get more complex. Moving forward, you're going to need technology built to weather the changes and keep you ahead of evolving trends. When selecting applications and vetting vendors, look for solutions designed to be durable and flexible.

Does the platform have everything you need to meet your customers' current needs? Will the app be updated with new features and functions when the market warrants it? These are the kinds of questions to be asking as you evaluate different options. Here are several indicators that the solution you're considering will last you a lifetime:

- Updates are released regularly according to a set schedule
- Upgrade costs are minimal
- The system is "always on," with extremely high uptimes
- Infrastructure can be easily adapted to incorporate new technologies
- The company spends more on enhancements than infrastructure
- It's easy to expand and grow globally



Getting Started with CX: Three Steps for a Successful Customer Experience Strategy

1. GET EVERYONE INVOLVED

The last thing you want to do is invest a lot of time and money into solutions and strategies that never get off the ground. There's only one way to reduce this risk: Get everyone involved.

Don't: Rely solely on a small group of project managers to select technology and build your strategy.

Do: Involve leadership as well as frontline staff. Interview employees to understand what tools they need to be successful, and make sure everyone is on the same page before you begin to flesh out a customer experience plan.



It's a big risk if you invest in a solution that people will not use. Which is why it's so important to involve the managers, directors and executives who will be driving user adoption — in addition to interviewing staff to understand what they need to be successful. Everyone has to be on board.

Marie Merckaert

[Savoy](#) // Content Marketing Manager

2. BUILD A BLUEPRINT

CX success starts well before you buy technology. It's important to begin with a blueprint that encompasses business alignment, team building and change management.

Don't: Rush to add to your technology stack without first deciding which specific features and functions you'll need to be successful.

Do: Use input from employees to create a detailed list of capabilities you need. Then match your technology to those needs — instead of the other way around.



The last thing you do is choose your technology. You don't choose it and then decide what to do with it. You figure out what you need to do first.

Paul Greenberg

The 56 Group

3. CONFIGURE YOUR TECHNOLOGY

Your customers aren't sitting still, and neither should your technology. The best CX apps and platforms will provide plenty of integration and configuration options. Use them!

Don't: Depend exclusively on out-of-the-box features and functions.

Do: Tailor your technology — from marketing automation to customer relationship management to customer service software — to meet your exact needs.



All you need is a vision of where you want to go, and then you can adapt [your technology] to meet your needs.

Sheila Jordan

[Star2Star Communications](#)

Conclusion

THE TIME TO FUTURE-PROOF YOUR CUSTOMER EXPERIENCE IS NOW

Customer expectations are evolving. Your technology should be, too. Your business doesn't stand still, and neither should your CX platform. The right solution will put you on a path to provide extraordinary customer experiences — for every customer, at every turn.

About the Authors

SugarCRM is the world's first intelligent, no touch customer experience (CX) platform. Powered by the latest technology in AI and customer intelligence, Sugar's groundbreaking software unites Sales, Marketing and Service teams with predictive insights they can use to create customers for life. And because Sugar is deeply integrated with the world's most powerful cloud infrastructure, Amazon Web Services, it's the most modern, durable and future-proof customer experience (CX) platform on the market.

WE'RE ON A MISSION TO HELP COMPANIES CULTIVATE CUSTOMERS FOR LIFE

NO TOUCH INFORMATION MANAGEMENT	INTELLIGENT CUSTOMER EXPERIENCE PLATFORM	CONTINUOUS CLOUD INNOVATION
Customer data is automatically captured from email, voice, text and third-party apps, and then delivered to users in context with what they're doing.	Advanced database federation technology keeps insights coming at you in real-time, for a 360-degree view of your customers' journeys.	As the industry's only AWS embedded solution, Sugar is free to innovate new features and functions as trends change — without having to pass hefty costs on to you.

Change Your Customer's Experiences for the Better

SUGAR'S PEOPLE-FIRST PLATFORM PUT CUSTOMERS BACK AT THE CENTER OF EVERYTHING.

We love our customers, and they love us. SugarCRM receives the highest Net Promoter Score across all major CX vendors.

START YOUR FREE TRIAL

AUTHORIZED PARTNER



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comza is dedicated to Sales-Excellence [SLX]. We believe in SLX being an integrated, continuously improved and systematic way of Sales-Management. SLX provides Sales-Enablement by leveraging omnichannel Customer Interaction.

