sugarcrm

STRATEGICALLY AMAZE YOUR CUSTOMERS WITH EFFORTLESS EXPERIENCES

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

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Customer Experience

It's repeated like a mantra throughout the business world. As trendy as it may appear, customer experience is more than just a buzzword. It is your ticket to a competitive edge and a way to make your company and product stand out within the industry. But if you're like most companies, you may not know where to start developing and defining a customer experience strategy.

To help provide a roadmap to customer experience success, we developed this guide to jumpstart your customer experience strategy and help you create experiences that have lasting impacts.

Building a Customer Experience Strategy

What is Customer Experience?

Customer experience, also known as CX, is exactly what it sounds like in the most basic definition; the experience a customer has with your organization. Though that is a succinct way to reference the heart of CX, it needs further explanation to understand the proper business case:

> "Customer experience is the customer perception of both direct and indirect interactions with your organization throughout the entire customer lifecycle."
>
> **- CLINT ORAM, CO-FOUNDER AND CHIEF STRATEGY OFFICER, SUGARCRM**

While the above definition appears at first glance to just add nuance to the basic definition, it provides important clues to why the customer experience is so important to organizations today. It's important to keep in mind that as you grow as an organization, furthering your CX strategy, your definition of customer experience will mold and change to fit your voice and company.

For now, let's start with breaking down this definition of customer experience to its most basic elements.

- **Customer**: Obviously, the heart of the definition is the customer, a general term for anyone who interacts with your brand. This includes prospective customers, current customers, or lost customers and it's important to note that this doesn't just include the people you have within your CRM as company contacts—it's every member of your customer's team. In addition, it encompasses all parts of the customer lifecycle. Each phase of the customer lifecycle impacts your brand.

- **Perception:** It's not just your brand's public persona that sets up how your customers perceive your company, but your social proof, as well as your product. Unfortunately, this aspect you have the least control over as a business but it is something that can be undoubtedly worked on internally for external results.

- **Interactions:** Based on the idea of perception, it could be trying to buy your product, troubleshooting a problem, interacting with

support, or even billing—all of these aspects affect the way a customer perceives your brand and has a lasting impact on how your organization is viewed.

- **Lifecycle:** We all know that customers proceed through different parts of the funnel, from prospect to customer to former customer. Once customers choose to churn based on interactions with your company or lack thereof, it's hard to convince them to stay. A superb customer experience can make the difference between loyal customers and lost customers.

Looking at the basics of the customer experience definition above, it's important to note that there are items both within and beyond your control as an organization. While customers and their perception are most certainly outside of your control, you can control the interactions they have with your company—both positive and negative, which is why having a CX strategy matters.

START

Why a Customer Experience Strategy Matters

This is where having a customer experience strategy comes into focus. By having a procedure to guide your customers through any circumstance, you can help shape your organization's perception. It's just as crucial for the negative experiences as it is for the positive ones.

If you don't have a plan for negative experiences, it's like being on a flight, realizing there is an engine problem, and not having any parachutes on the plane. No one thought they would have a problem, so why would you need a backup plan? Just like this scenario, your organization must have a plan for both smooth experiences and crashes; otherwise, you're leaving customers without a parachute to figure out how to manage on their own in a crisis. Likewise, positive experiences should also have a plan to provide a record of your successes and build your brand.

Effectively, when it comes to your product or service, you're the expert and should understand common problems, plan for them, and know what to do if it occurs. This plan for both positive and negative occurrences forms part of what encompasses your customer experience strategy.

Your CX strategy impacts two things:

- How your company is perceived
- How your organization serves its customers

Customer experience is deeper than product reviews and customer satisfaction. It is the sentiment associated with your company as a whole. More tangibly, customers that have a great customer experience will spend more, remain customers for longer, and spread the word. What's important to note is that the customer is at the heart of all this because they shape the market's reception to your brand and product, ultimately impacting your company's revenue.

> "Customers are willing to spend 10-20% more for a great customer experience but 54% of US Consumers say customer experience at most companies needs improvement."
>
> - PWC

Crafting Your Customer Experience Strategy

Most companies realize that they need to focus on the customer experience but don't know where to begin, or they have a strategy but aren't as customer-centric as they might like. Regardless of the situation, every company can benefit from going back to the basics of a customer experience strategy because they are the building blocks that provide a foundation of any customer experience. In the simplest essence, customer experience is:

Sum of All Customer Interaction(s)

Customer Expectation

Customer Experience
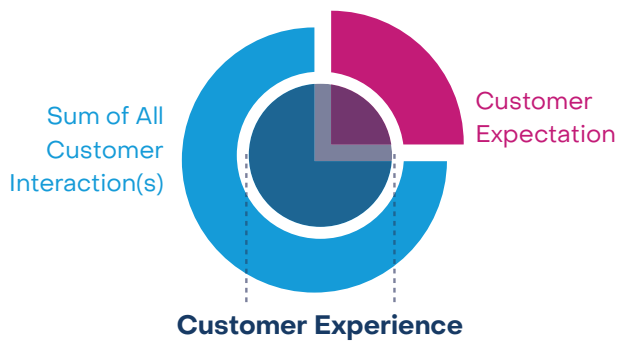
As shown above, customer interactions are those they have with your brand, and customer perception is their expectation of those interactions.

Before You Begin: Understand Your Organization's Customer Experience Right Now

To start, you want to understand where your customer experience is today. If you don't know, it's time to do some digging through internal systems, measuring public personas, and talking to current and former customers. What you uncover during this research will indicate how mature your organization is within its customer experience journey. Whether or not you have a customer experience strategy in place within your organization, it's important to do this periodically. It's an honest and holistic look at processes, business management, and customers, which can help any company grow.

Here's the information you should be gathering right now and why:

Internal

- **Deals Lost and Won:** Determine the why behind your deal's success and failures, understand what customers wanted from your organization, expectations, pain points, and decision influences.
- **Customer Churn:** How many customers buy again or renew? Understanding how many customers you lose year over year and why is essential to business improvements.
- **Internal Sentiment:** This one is a bit trickier depending on your internal culture but asking employees for feedback on what they believe is working versus not directly impacts your customers. In other words, what's your internal temperature and employee happiness?

- **Employee-Customer Interactions:** What are your employees hearing when they are interacting with customers? This should cover everything from accounting to marketing to sales to customer service—anyone who interacts with customers.

> **TIP: While uncovering this information, pay careful attention to the emotions of your customers—how they felt, the smoothness of interactions, and expectations. During interviews, utilize open-ended, non-leading questions to solicit genuine feedback.**

External

- **Current Customer Interviews:** What keeps your existing customers buying from you? What do they see as your weakness? Understanding how your current customers perceive you allows you to create a roadmap for improvements.
- **Former Customer Interviews:** What caused the customer to no longer buy from your organization? This should help you uncover the pain points that they had and what, from their perspective, you did to lose their business. These interviews can be eye-opening, even if they point out some hard-to-swallow insights.
- **Social Media Reception/Sentiment:** How do people react to your brand online? Are you seeing engagement, and are people talking about your company on social media? Doing a general search of your brand and hashtags potentially associated with it should provide a general sentiment about your brand.

- **Online Reviews:** Do customers love your products or hate them? With review sites and functions everywhere, you shouldn't have an issue locating them. How your company is reviewed on employment sites can also affect your public brand image and potential to hire an area not to overlook.
- **General Search Results:** Type your organization's name into the search bar and review the results. Sounds easy, right? Be sure that you aren't looking for your organizational pages but what other websites might be talking about your brand and/or product.
- **Competitor Assessment:** Do you know where your current competitors rank in the above areas? It's time to find out what customers are saying about them publicly and see how your organization compares.

After gathering the information, you should have a clear picture of what your customer experience is currently. Analyze the sentiment you collected as well as a list of strengths and weaknesses of your organization. It may not be what you expected, but it is the starting point to begin or reframe your approach to organizational focus on customer experience.

Know Your Customers

While many steps while defining your customer experience strategy can be easily adjusted to fit your organization, this step is a key part of the process, whether you are just starting or continuing your current efforts. Customers are at the heart of your journey to providing exceptional customer experience, and it's absolutely essential that you understand their journey from problem to purchase.

Through understanding where your organizational customer experience is currently, you have a great deal of information that you require to complete this step. But there may be additional information that you can source from internal technology like your CRM, marketing automation platform, etc., or work that you have completed internally before as a starting point for understanding your customers. Here's what you need to understand your customers:

- **Understand the Current Buyer's Journey:** What steps do customers complete to purchase from your company and after they purchase? From the first interaction to the last, it's essential to know what is currently occurring and what is breaking down according to customer feedback that you previously solicited.
- **Define your Customer Profiles:** Understanding your customers not only applies to knowing their names but the more general information that

drives solutions from your industry or vertical. While you may understand the generalized profile relating to company type, industry, company size, revenue, and other firmographic information, defining the customer profile goes far beyond that. Here you want to evaluate pain points that they are facing, expectations of purchase, common motivations, and use cases. During this, it's perfectly okay to have multiple profiles or personas, but don't lose focus by creating so many that you cannot optimize internally. Personas should be focused on the verticals where you want to succeed, not in every industry you have or could do business with.

These are just the basics to understanding your customers, and this whole process is about shifting to enhance their experiences. Not only do your customers want to be understood, but they also want personalized experiences and expect them, making this step one of the most important steps in your customer experience journey. As you grow in delivering these experiences, refine, revisit, and optimize the personas and journey to fit your customers. In the end, excellent customer experience evolves by constantly adapting—anticipating and meeting the needs of your customers.

Incorporate Everyone into Your Customer Experience Journey

One of the most frustrating but important actions of this process is to share your findings within the organization—specifically the leadership of your organization. It's a hard look at your organization's customer experience because the reality may be different than internal perception, which can cause friction. When obtaining buy-in within your organizational leadership, it's important to point out that customers who have good experiences are likely to spend more, customer churn costs cut into profit, and that customer experience is your organization's competitive edge in today's market.

Presenting the facts, organizational leadership should then start the trickle-down process, soliciting feedback within their areas to not only build excitement but begin aligning management to the changes coming. Relay this information by discussing moving the internal focus to customers and defining success based on customer feedback and revenue. While there aren't specifics to the strategy right now, it's important to gauge the team's feedback and the ideas they provide in response because these ideas are invaluable.

This step cannot be understated—it's absolutely essential to have everyone in the customer experience strategy. Think of it as priming the engine before starting it; while you don't want to flood it, you definitely want to ensure that you are prepared for a smooth start. Just like the adoption of new business technology, making sure that people feel they are informed and involved with new internal initiatives helps them feel successful.
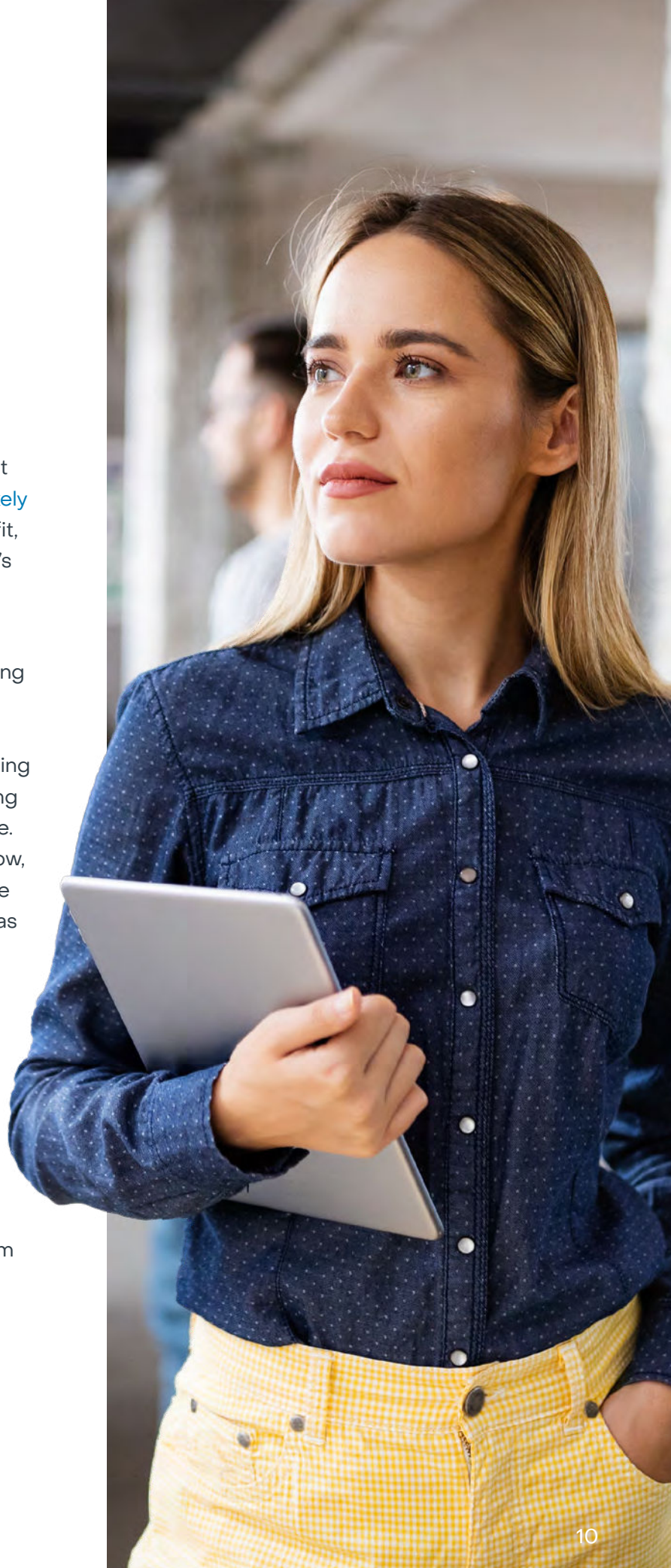
Define Your Vision and Goals

The information you uncovered in step one should provide an idea of what you need to do to enhance your organizational customer experience, but this is a step beyond. Sit down with your organization's key stakeholders and define your vision and goals. This is your chance to take the lead and visualize what is possible.

First, it's time to consider what is the gap between what customers expect and what your company is providing. That gap should cover what should be done within the shorter term but will provide direction on what your goals and vision should be. Here are some questions to ask when it comes to defining the vision:

- What do we want to see in the short term for improvements? Long-term?
- Do you have internal employees that have rallied for change and what are they saying? What would they suggest the vision should be?
- What financial investments are you prepared to make with customer experience?
- What does your company need to do to have a direct impact on revenue?

- What internal improvements could have external implications?
- Why are you working on customer experience?

These questions should provide a springboard for starting out your customer experience vision but are by no means an absolute list. Define the overarching vision for customer experience within your organization and both long-term and short-term goals for the initiative. Keep in mind, the customer experience initiative is part of your organizational goals—the strategy is how you get there.

Write down your vision, solicit feedback, and establish it within the organization. Having a clear vision for customer experience ensures that no one is surprised by shifting focus as long as the vision is well-communicated within the organization.

> **Make sure you communicate the vision across the entire organization because it's a shared vision and goal for everyone, from the executive team to the new hire.**

Map Your Goals to Teams and Processes

Whatever your goals are, they need to be put into practice internally. Once defined, these provide the metric for teams to strive for. This falls into two categories, organization-wide and departmental.

Organizationally, you'll want to have some common goals across all teams that you strive for—this is why creating a customer-focused culture is so important. Map your organizational goals to your culture and, most importantly, communicate them to your teams. This is where you make sure to align the organization against silos and create a mentality that shares the same goal regardless of function. You can do this in a variety of ways, from brand campaigns to lunch and learns, but the important thing is to keep the message simple, aligned, and on target so that everyone is working toward the organizational goals.

The secondary part of this is refining and optimizing the customer journey that you have internally and uncovered in the first step. Highlight the issues you want to fix based on your goals and customer feedback, then revise and simplify the journey centering around what is convenient and expected by your customers. This is an organization goal because the journey must be defined at the top and then implemented cross-functionally across departments.

The more complex side of this is mapping your vision and goals to departmental teams based on function but without creating silos that damage your customer experience. Think of the gap that historically existed between sales and marketing for context here—you're going to want to avoid creating that tension between departments but instead provide transparency for a complete customer picture. It's important to note that this is not just for customer-facing teams; everyone in the organization needs to have a role in customer experience. Bring your department leaders and managers into the conversation here; provide them with the goal and align with them on how to get there—creating ownership and a shared goal. Why? These people are your organizational experts in each department's day-to-day, possessing the insight that higher levels of leadership may not see.

Teams may have similar goals, but no two teams will be exactly the same in how they approach the goal. The communication that you have organizationally will influence the mindset of every team as they work to strategize ways to meet the goals set for them, laddering up to the organizational vision. Having this on a team level also has the added benefit of optimizing internal processes that may have previously barred an exceptional customer experience—by doing the work and optimizing, each team has an investment in the organization's customer experience journey.

Provide Tools to Help Your Organization Succeed

The tools you have within your organization must align with the customer experience you are creating. This means you need high-adoption, low-maintenance, easy-to-use tools that do the work for you rather than taking up time with cumbersome features and data entry. Every team should be enabled through your business systems and be able to see a complete, holistic customer view that allows them to understand where they are in the buyer's journey, see historical interactions and concerns, and tailored information that personalizes experiences. Without a complete customer picture, you're unable to understand customer churn, highlight customers who are at risk, or increase your revenue.

Creating that centralized customer view should be essential. Departments need to work together to align with technologies that integrate and communicate, effectively barring the silos of information between teams. Here are the business tools and software that you should be integrating internally to help enable a complete customer view:

- **CRM:** A Customer Relationship Management System, or CRM, provides a single repository for information about customers and potential customers, guiding the buyer's journey and keeping everyone informed on opportunities and current customers. The data within this system is shared information for sales, customer service, and decision-makers. A successful CRM shows your organization's historical interactions with customers and provides insight directly within the system so that sales can focus on relationships rather than maintaining the system.

TOOLS

- **Marketing Automation:** A robust and good marketing automation tool combines email marketing, lead scoring, lead capture and tracking, nurturing, event management, and social media marketing into one application. This information provides marketers the opportunity to ensure they are providing the right information, at the right time, and right stage of the customer journey. Marketing automation must successfully integrate with your CRM to provide the link between marketing and sales to avoid siloing information and reduce lead hand-off time.

- **Customer Service Software:** Customer service software can vary depending on who you speak to and, historically, many organizations utilized their CRM to track customer issues and service requests. The problem is CRM is not meant to act as a tool for customer service which means that customizations are needed to the CRM, which are costly and often break. However, customer service software is designed to integrate with CRM and provide contextual information to sales about historical customer interactions. Unlike CRM, customer service software is optimized for service providing easy ways to make self-service centers, route cases, determine SLA, and more processes that are specific to customer service.

- **Artificial Intelligence:** More than a buzzword, artificial intelligence is an essential tool to customer experience whether it comes from marketing, sales, customer service, or an internal team because it can help to find answers quickly and effectively as well as alert and inform internal stakeholders plus uncover insights that others miss. It's not replacing employees but having them focus on the actual human instead of searching for predictive insights, the right webpage, or preventing the connection between a prospect and sales leader.

- **Communications:** How your teams and company communicate are essential to customer experience—can people interact and work together no matter what team they are on? Are people utilizing the same system to help increase communication? Having a single platform for communication may not seem like a big deal, but it is to streamline internal processes. There are multiple levels to this, from chat, meetings, and email. Everyone needs to be on the same technologies to streamline projects and communication, so you aren't wasting time from employee to employee on finding the right internal tool.

- **Cloud Computing:** Less of an actual tool but more of a feature, cloud computing is essential to remote connectivity. You want your information to be secure but accessible to your team regardless of their location, and that means you need tools that are cloud-enabled to provide the best solution possible. With an increasingly mobile and remote workforce, this is essential. Otherwise, you're losing potential valuable ground if employees aren't working with the most up-to-date information within your business systems.

Each of the above tools has nuances, but here's the essential takeaway—every tool you have must integrate and communicate to create a clear customer picture for everyone. This means you have to find a solution that suits your organization and enables customer experience. Focus on systems that have the above features and qualities, as well as measuring internally what tools each team needs to be successful in reaching their customer experience goals.

For more detailed coverage of what technology you need to enable great customer experiences, check out the Driving Memorable Customer Experiences with Technology eBook.

Measure, Adapt, Repeat

Throughout the steps above, your teams and organization should be actively implementing the insights from your research and optimizing processes, but it's not enough to just do it; you must measure and define success. If you don't measure, you're throwing hard work out the door. To measure your success and progress, track these key insights that are ranked by importance:

- Customer Retention Rate
- Customer Engagement Rate
- Sales metrics
- Customer Satisfaction (CSAT)
- NPS
- Average Speed of Answer (ASA)
- Average Handle Time (AHT)
- First Contact Resolution (FCR)
- Internal process improvements
- Internal feedback and sentiment
- Customer issues/feedback
- Brand awareness
- Online presence/reviews

If something is lagging, it's time to revisit. Perhaps your goal wasn't aligned properly or one that didn't hit the market well. Much like any campaign, it's normal to find misses within your execution, fix them, then continue to align and adapt to your organizational strategy. There are going to be failures on your journey to creating a great customer experience; use them as learnings and adjust as needed.

Continually ask your customers for feedback to understand what areas are missing the mark and what areas exceed expectations. What your customers provide as feedback should continually grow your strategy. Don't forget to make sure you're talking internally too with employees and understanding what is working for your company and not. Sometimes customers can't see internal breakdowns, but they will feel them if you don't keep a pulse internally. Internal investment is also a large part of your organization's customer experience success.

The last part of the strategy is repetition. Just as your organization will grow, your customer experience strategy should as well. Whatever you do internally to enable customer experience should not only be expandable but repeatable. Customers will change, employees will change, the market will change—just as your organization grows, customer experience maturity must also continually evolve. Winning at customer experience is centered around creating customers for life.

> **"Profit is the applause you get for creating a motivating environment for your people and taking care of your customers."**
> **- KEN BLANCHARD**
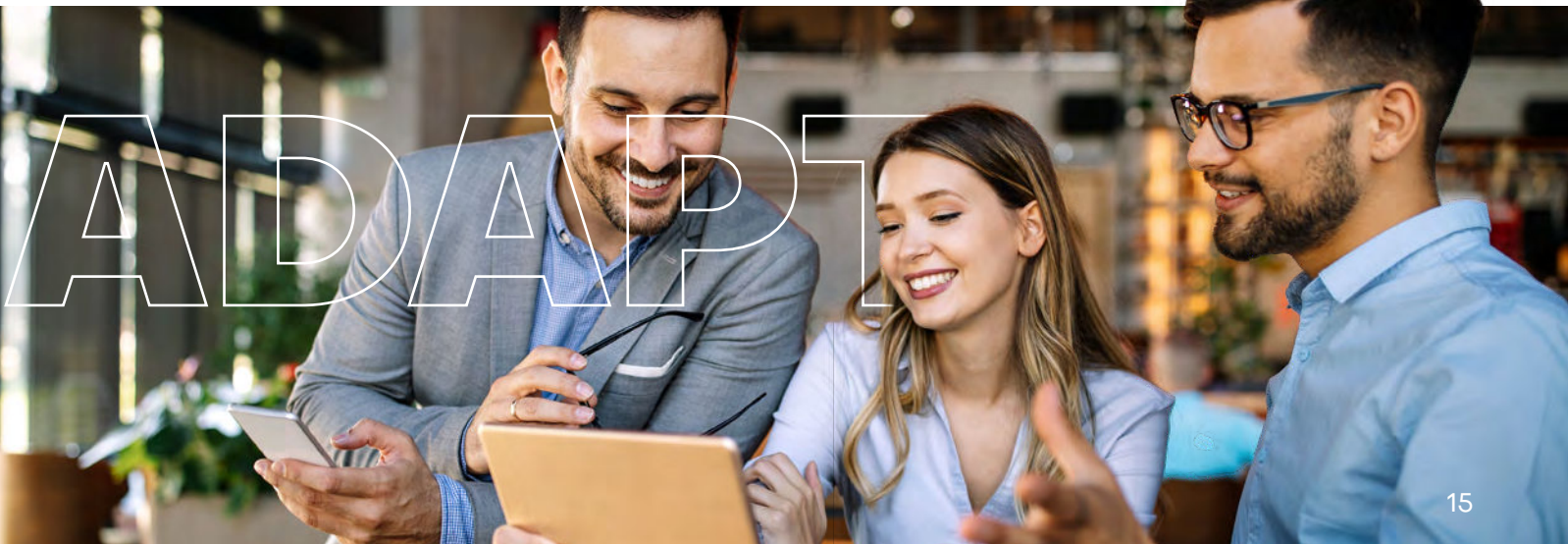
AMAZE

Strategically Amaze Your Customers

Your customer experience strategy is the first step in amazing your customers, and it can only grow from there because it's centered around them. Customers want personalized experiences that meet expectations regardless of whether they are businesses or individual consumers. At the end of the day, you are selling person to person, and that is the experience that will impact your organization.

Creating a customer experience strategy may seem like a daunting task, but it's no longer optional if you want to remain competitive in your industry. The good news is, you can let your customers lead the way to help you define what works and rely on your internal talent to implement effective tools and processes within their teams.

You aren't alone in your customer experience journey. If you're not sure where to start, we're here to help you on your customer experience journey enabling you to deliver the experience that your customers crave.

Creating a Customer-Focused Culture

Customer Experience Requires Customer Focus

The traditional business model is shifting—customers aren't content any longer with the aged model of money for goods or services. They expect more, and they have leverage. They know that your business wouldn't exist without them. From product innovation to sales processes, customer feedback shapes organizational processes and roadmaps (and if they don't, they should).

> **But how did we get here?**
> **What led to higher expectations?**
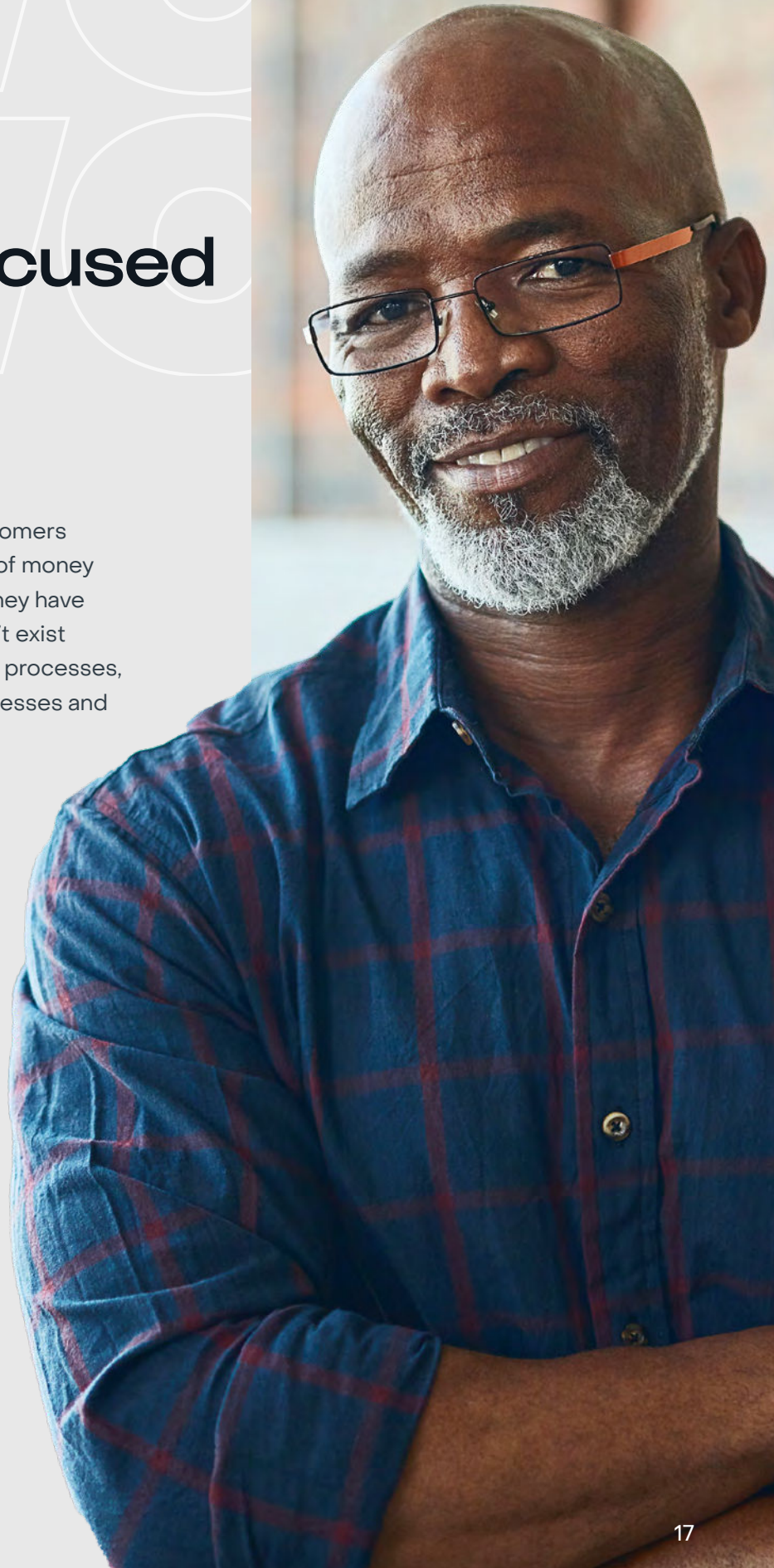
There's a definitive philosophical element to this, but the answer to why customer expectations and the market changed is tri-fold:

- **Technology**: The computer and the cell phone revolutionized the market, enabling worldwide connectivity almost instantaneously. The rapid expansion of the global market transformed how we do business—connecting us to the other side of the world with computers that fit snugly in our hands.
- **Competition**: Technology and globalization led to increased competition worldwide. By increasing vendor choice via digital advertising, a more level playing field emerged for non-enterprise level business resulting in customers having their choice within the market.
- **Availability**: Relating once again back to the technological advancements available and globalization, customers pick the products they want when they want them. The idea of on-demand created options for customers shifted business from the one-size-fits-most approach to more tailored options and increased availability.

With increased availability and competition, customers have increased choice within the market, and this causes companies to lose standard advantages once available to them to differentiate their organizations. The solution? Enhance the customer experience and exceed expectations. This shift puts customers in the driver's seat, informing businesses of what was lacking and applicable in interactions while allowing them to further differentiate and define themselves based on the customer experience.

Today, customer experience is no longer optional. It is a requirement to differentiate yourself within the market. A proper customer experience strategy and organization must be knowledgeable of and in sync with customers.

Effective customer experience requires customer focus, but you cannot be customer-focused without bringing everyone within the organization.

FOCUS

Why Customer Focus is Necessary

Even before the technological advancement of cellular phones or the internet, companies differentiated themselves via the service they provided. Those companies are still around and are continually customer-focused, just having adapted to a new environment. Likewise, legacy companies are just coming around to differentiating themselves via service, previously relying on product or reputation to enable profitability.

The benefits of a customer-focused organization are evident in the market. Those who excel in shifting focus to customers and their experience drive greater profitability, increased brand value, customer loyalty, and happier employees.

> "Companies that have CEO and leadership lead customer experience report they're more profitable than competitors."
> – THE ECONOMIST

Increased Profitability

Businesses that focus on customers and the customer experience are 60% more profitable than those that do not. This means that there is a direct impact on the organization's revenue and that those who excel in the field are more likely to have financial stability and revenue growth.

Increased Value

Customers are willing to pay more for a good experience—a whole 10-20% more. Do the math for your organization: If you were to increase your current revenue by 10%, what would that mean for revenue? These returns are direct results of enabling customer experience within an organization.

Customer Loyalty

Customers that feel valued stay with brands, with 73% reporting that their experiences directly influence loyalty. Customers want to stay where they feel valued, and they will spend more money with brands where they've had good experiences. The experience is directly related to customer satisfaction with your business.

Happier Employees

Culture affects customers. Happier employees drive increased brand loyalty and help influence customer sentiment. Companies that have happier employees have more engaged employees resulting in outperforming competitors by 147%.

Focusing on the customer means a direct impact on your business, and it's in your best interest to create an organization focused on the customer experience. But that last point is why this step in your customer experience is so essential: Employees must be in sync to have a customer-focused organization because they are the enablers. This type of customer-centric culture comes from the top down. After deciding to be customer-centric, CEOs and executives must light the way for their organizations to reap the benefits.

How to Create a Customer-Focused Culture

Make no mistake: Creating a customer-focused culture is a significant shift for any organization. Depending on your customer experience strategy and track record with customers, this may be more change for some organizations but a necessary one. To remain competitive and profitable, you must focus on your customers.

These steps are a roadmap to enabling a customer-focused culture while determining the timeline based on your organization's customer experience maturity and internal culture.
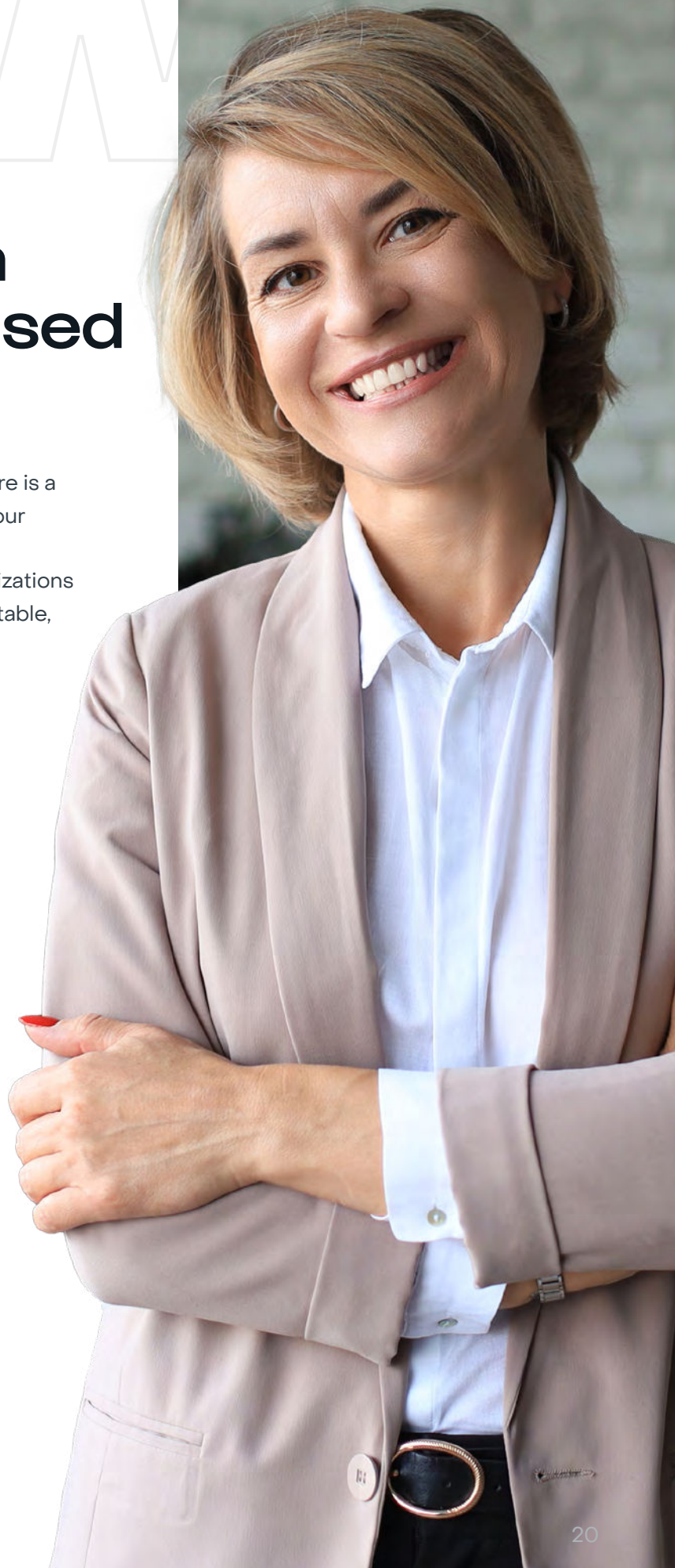
Listen, Listen, Listen

This saying holds true to this day and is applicable in this step. It's time to listen to what employees are saying and take action. While customer focus must come from the organization's leadership, the day-to-day experiences fall to employees. They receive direct input from customers and each other. They know what's working, what's broken, gaps, where the problems are internally, and the overall feeling both internally and externally. It is your job to provide an outlet and the ability to share what they see openly.

Listening means more than just having a single conversation; it's creating an open dialog within your organization to enable change. It establishes ownership internally because your employees are invested in their own experiences and ideas, plus it provides an actionable roadmap for executives to help better enhance culture.

> **"We have two ears and one mouth so that we can listen twice as much as we speak."**
>
> **- EPICTETUS**

Open dialog makes employees feel comfortable with raising concerns and sharing insight. Not only do you need to eliminate any consequences for voicing a truth that may be hard to swallow, but you need to make it easy for employees to submit feedback and review internally. The process is two-fold, but it relates to the essence of what you're listening for here—the truth.

- **Listen:** Learn what is working and not so that it can be fixed, an essential step within your customer experience journey.
- **Address:** Authentically address employee concerns without being dismissive. Sometimes the feedback is an early warning, other times it may not be as big an issue, and you can help the employee grow.

In either scenario, listening and providing authentic reception is a win-win situation for your organization and employees.

LISTEN

Methods to Open Dialog

The method in which you create an open dialog is directly related to your organization, and you should choose the best fit. Here are three actionable ways to enable and create open dialog within your organization:

1. **Employee Resource Groups or Committees:** Groups and communities are safe havens for individuals in social settings because they reduce stress. Employees involved in these areas feel safe and empowered to share direct feedback because there is safety in numbers, making it harder to single out an individual, and provides reinforcement for their experiences even if they are not shared. Groups or committees are effective because they enhance conversation and create a line of communication to leadership. These groups can align to needs, specialties, social groups, or functions within your organization. Take the feedback that you have had previously in your organization and jumpstart employees with ideas for potential topics or expertise without limiting it too tightly.

2. **Employee Surveys:** This is a different methodology than measuring your employee engagement via employee pulse surveys for HR purposes. Instead, it focuses on soliciting feedback on customer interactions, internal processes, and workflows directly related to doing their job. It allows you to find out where there are roadblocks related to their jobs as well as opens up a lane of communication regarding what they hear within the organization. These surveys should be completely anonymous, allowing employees to feel safe to share opinions. Depending on your current culture, some employees may feel better putting their name on their feedback but don't require it. Allow it to be a forum where requests are raised and taken seriously, always open to everyone in the company (that includes executive leadership).

3. **Authentic Reception, Action, and Feedback:** No one wants to think that their idea or concern is invalid because, to them, it is a genuine issue. However, that doesn't mean that it applies to the entire organization or your customers. Regardless, it does need to be received and addressed by the company because both silence and criticism are negative reactions that will deter open and honest communication. Constructively help and address the issue—whether that is helping to reframe perspective or validating their feelings. Employees won't present trivial concerns; they will raise what they feel are genuine issues, and they are trusting that leadership will address them in a considerate and actionable manner. If you lack action or openness, this trust will disappear, and the silence that follows could cost your organization a valuable employee or potential revenue.

These are only a few ways to enable and open dialog within your organization to listen effectively, but they are viable approaches to make employees feel heard. Listening is not optional—it's required to create an open dialog that predicates change within your organization's culture. The size of your organization may influence what avenue or hybrid of avenues you chose, but it's not a one-and-done action. Listening requires the dedication of your leadership team to take action and provide viable feedback after. Employees that feel heard in an organization feel almost five times more empowered to do their best.

Communicate Continuously

Hand-in-hand with listening is communicating with your employees. We've all felt like we were the last to know something, like it was a secret kept from us without knowing why and it made us feel alone, outcast, forgotten, or any myriad of negative emotions. Employees that don't feel their organizations honestly and openly communicate with them are more likely to feel uncertain, wary, isolated, or even hostile. However, the truth is that organizations are not communicating effectively internally but rather keeping employees in the dark. Open communication allows for informed decision-making within a culture.

The benefits of effective organizational communication are numerous, from increased employee engagement to productivity. 85% of employees feel more motivated when hearing from company leadership regularly, meaning that it's in your best interest to open the lines of organizational communication. The question then becomes, how do you convey your message and communicate effectively?

- **Consistency:** Stay on topic and on message without varying. One of the most important aspects of effective communication consistency eliminates confusion within the workplace.

- **Set the Tone:** How you relay a message is just as important as the words within it. When communicating throughout the organization, set the tone of the communication based on your brand, message, and desired outcome for maximum effectiveness.

- **Match with Action:** Communication isn't always verbal or written, which means that whatever you are communicating within the organization needs to be followed up with action. If your actions don't match what the organization is communicating, you're damaging relationships and the trust of your employees.

- **Keep it Simple:** A message that is simple and easy to understand eliminates confusion and provides a set standard to your organization. Clear and concise communication is effective and produces results.

- **Two-Way Street:** Don't limit communication in your organization to just what leadership is saying. Create two-way communication between employees and leadership. This builds relationships and trust, proving that you're listening to employees.

- **Right timing:** Just like tone, it's important to find the right time to communicate the message to your organization. If you're in the middle of a huge company-wide initiative, it may not be the best time to convey something via email. Finding the right time means knowing your audience and awareness of the world around you.

- **Silence is Communication:** Keep in mind that while your employees are hearing what is being said, they are also cognizant of what is not. When choosing the topics you want to communicate, remember that not addressing topics can be just as harmful as conveying the wrong message.

Avenues of Communication

Knowing how to communicate within your organization is only part of the process of effective communication. Just as important as how you convey your message is the method or delivery of your message. In business today, we have multiple avenues of communication, including email, chat, and project management. What is the best way to communicate within your organization? Your organizational culture will create a baseline of how to communicate, but here are some additional ideas to open the lines of communication within your organization.

- **Town Halls:** Open meetings and updates to your entire organization. Events like town halls create transparency and should be led by the CEO or executive team members to demonstrate openness and communication beyond quarterly results. These updates remove the surprise element from the business, which can blindside employees when there isn't open communication.

- **One-to-Ones:** Manager communication with employees should be continuous and consistent throughout the organization. Keeping employees connected with managers allows for clear communication of goals and expectations to the employee. The employee can raise concerns with their manager to be addressed. It actively contributes to open two-way communication internally and also lifts the anxiety that can come with "being called into the manager's office."

- **Multi-channel Use:** Your organization has many channels more than likely that they use to communicate daily, including chat, meetings, video conferencing, forums, email, and product management (to name a few). Make sure that when you're communicating important messages and/or updates, you're not just using a single channel to communicate it. When working, some people have chat muted to focus, others miss company meetings, or an email is missed—however, the likelihood of missing the same message on all these channels is much lower.

- **Utilize Digital Workplaces:** For some, the company intranet is a black hole, but it is a good option for communicating with your organization. Likewise, digital communities or workspaces beyond chat provide a great place and community to share communications effectively. By utilizing these digital workspaces, you allow for an increased probability that the message is seen.

- **Q&A Sessions with Leadership:** This is a very interactive way to increase communication, but it is different from a town hall in that it centers around the executive and allows for employees to ask questions previously or during the event. It also grows trust and opens lines of communication between the organization and every employee.

Communication is an essential way to build a culture that fosters its customers because it allows for open channels to escalate issues found and flag potential roadblocks. But it's not just about those who interact with customers but the internal employees who keep the company running. Allowing both customer and non-customer-facing teams to communicate facilitates the same ability to highlight internal processes that aren't working and could potentially damage customer relationships. Additionally, each of the ways to communicate listed above can also be adapted to suit customers, creating open communication between customers and your organization.

Internal communication directly affects external communication to customers and enhances the customer experience. Communicate that you want customers to be at the center of the organization, convey the message continually and constantly throughout the organization. Employees can then take action and use optimal ways to communicate with customers, creating an open and clear communication that produces results.

Communication is an essential way to build a culture that fosters its customers.

Employee Empowerment

Having a tight rein on how things are handled across the organization is great for leaders who want to be involved in everything. Still, it's not optimal for the culture within your organization. Of course, this doesn't mean that it's free-for-all internally, but rather that you increase the employees' ability to act on customer behalf and take action to make things right if needed.

Employee empowerment is an excellent enhancement to your customer-focused culture because employees feel like they can become customer advocates rather than just company advocates and are more engaged. Empowerment can mean anything from giving your employees the ability to spend if it's needed to using internal resources to make it right. Here are direct ways that you can increase employee empowerment internally for external results.

- **Boundary Setting:** Employees that know they can help customers feel empowered to be more effective. By boundary setting, such as empowering employees to use a percentage of the customer contract to solve an issue, you allow them to feel more confident and competent.
- **Forgive Mistakes:** No one wants to feel like they are walking on eggshells when it comes to working. Change the way you respond to mistakes in the organization to empower employees to be more confident and make them less scared of failure. Removing that fear of reprimand allows them to deliver a better customer experience and increase customer satisfaction.
- **Allow Creativity:** There are specific ways that some processes or solutions must be done but don't limit employees to one prescriptive way to reach a solution. Foster creativity within your organization to have it ripple down to the customers. Creativity allows employees to think outside the box for solutions and ways that they can better help customers in their role.

- **Support Career Advancement:** Most employees want to advance their careers and are willing to invest time moving up the organization's ladder. Allow employees to take time to improve their skills, whether that means providing workshops, lunch and learns, or eLearning opportunities. Increased skill enhances employee effectiveness in their roles which furthers customer relationships.
- **Increase Autonomy:** Going hand-in-hand with boundary setting allows employees to take ownership and responsibility without having manager oversight on everything, making them feel empowered to make decisions more quickly. Autonomy also allows things to move faster since approval isn't needed on every item, and it doesn't sit within a manager's queue, delaying action.
- **Praise and Recognize:** Everyone enjoys being told they are succeeding, and it's recognized within the organization. Take the time to praise employees for everyday successes and recognize efforts to go above and beyond when it comes to the customer experience.

Employees who feel empowered are more successful, which translates directly to customers. A customer-focused culture must start with employees to make it successful. Empowerment translates to customers in effectiveness and speed, both factors that can make a marked increase in customer satisfaction and your bottom line.

> Employees are your greatest asset when it comes to customer experience. Create a culture of excitement and run with great ideas for additional buy-in.

Nurture Organizational Culture

Whatever you do to create a customer–focused culture based on the steps above, it's important to remember that it's not a one-time action but a continual investment. Whatever steps you take internally need continual review and care to ensure effectiveness. This means that you need to measure, ask, and refine internally for success.

- **Measure Success:** Many companies track customer satisfaction through Net Promoter Scores because it's an accurate measure of customer sentiment. Likewise, this metric can also be used to track how well you're creating a customer–focused culture internally. Companies that invest internally to improve customer experience can also see the results by adopting a "Voice of the Customer" program to engage with customers beyond surveys personally to see how well the organization is delivering to their expectations.

- **Ask and Communicate Internally:** Companies can even do the same with employees to measure how they feel enabled and empowered to do their jobs. "Voice of the Employee" analytics can demonstrate internal sentiment and address areas of weakness within the organization. Beyond that, regularly asking employees how they feel their interactions with customers are and surveying general culture opinion can help you optimize and achieve more.

- **Refine Continuously:** Based on what you are learning from customers and employees, how can you better enhance your internal customer–focused culture? You want to know where you've seen success and utilize those methodologies in areas where you're failing. Maybe it's communication that's lacking or listening, but it doesn't mean that you can't refine these processes to enhance them.

- **Adapt Your Hiring Process:** How can you adapt your hiring process to demonstrate your commitment to customer experience from the very first interview with a prospective employee?

Identify questions and talking points for your interview process to determine if an employee is a good fit for your organization from the start.

- **Teach:** If you are only just getting started with implementing a customer–centric culture in your organization, take this moment as a teaching opportunity. Can your average employee effectively communicate their impact on the customer experience? For someone in sales, marketing or service, this may be easier to answer. But what about product, IT, finance, or operations? While the answer may not seem obvious, every employee plays a vital role in the customer experience. Sit down with your employees and talk through their impact to understand their role in the bigger picture.

Nurturing a customer–focused culture also means identifying customer champions internally and using them to help mentor and excite other organization members. Passion is contagious, and customer champions are effectively cheerleaders for the customer–focused culture.

On the flip side, you may find that some employees are not receptive to the customer–focused culture. Take the time to work with them to increase their participation in the culture and do what you can to help guide them to a customer–focused mindset. If this doesn't work, it's time to think about how people who aren't on board with the new culture affect the organization and determine if they are doing more harm than good. Creating a customer–focused culture for customer experience can require some complex employee evaluation of their value to your organization's new focus. Continually nurturing your internal culture is a long-term project that can bring changes to the organization and multiple improvements.

Provide the Right Tools

Communicating and enabling a cultural shift is essential to begin the transformation process. Still, you need to continue the momentum by providing the right tools for employees to do their jobs effectively. Employees that don't have access to the tools they need struggle with tedious, manual tasks that impacts their mood, leading to increased frustration.

When employees are frustrated or lacking the tools they need, lower productivity and employee turnover occur. The effect impacts your customers because employees are a crucial part of creating positive customer experiences. Provide employees the right tools allows them to focus on building on the customer relationship and empowers them to be successful. The benefits of enabling employees with the right tools include:

- Less wasted time
- Fewer clicks
- More automation, less busywork
- Integrated solutions

To learn more about how you can select the right tools for your organization and empower employees, check out this dedicated guide on technology for outstanding customer experiences.

CULTURE

Bringing Culture Back to the Customer

Customer satisfaction and employee satisfaction go hand-in-hand because they grow in parallel. Creating a customer-centric culture means continually being engaged with your employees at all levels of the organization. The customer response to your company pays for employee salaries and affects the organization's bottom line—it's transactional.

Culture is a continual investment within your organization. With increased expectations from customers and employees who want to succeed, your organization can shift to being customer-focused to support your customer experience initiatives and grow.

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.

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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.

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