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The **Executive Guide** to

CUSTOMER ENGAGEMENT

Connect to your customers
in a whole new way

INTRODUCTION

A good customer service leader knows that customers rely on social media and mobile technology to stay hyperconnected. But it takes a great leader to know how to leverage that universal connection to create a more personalized experience – one that will help the company build lasting relationships with each customer along the way. This is an important distinction for leaders looking to elevate their customer service. We looked at how top companies are aligning their sales and service teams to drive immediate, personalized, smart, connected customer experiences.

Keep reading and you'll learn 8 strategies that will help you elevate customer engagement.

1

Increase customer satisfaction with sales data

Service teams are often in the dark when it comes to communications between sales agents and customers. This is mostly because service agents have zero visibility into those interactions – even if they've been documented somewhere. But there is a simple solution for that nagging knowledge gap. Getting your sales and service teams aligned within a single platform – where all customer interactions are visible to both teams – will give your service agents the know-how they need to personalize the experience for your customers. Service agents can view (in real time) recent purchases, outstanding orders, recalls, community activity, product performance, and customer complaints all within your existing service console. Access to this data instantly makes them more proactive when it comes to recommending products or services. What's more, your service agents can help grow new business, too, taking new orders during support calls.

"Salesforce helps us offer the kind of service that – like great design – never goes out of style."

John Edelman
CEO
Design Within Reach

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Boost productivity across your business with smart service data

The data connection goes both ways. Just like service agents can use sales data to better inform customer interactions, other departments can use service data to drive higher customer engagement. For instance, if sales agents had customer insight, including customer satisfaction scores and information about open cases, they'd know when and how to engage with each customer. If all customer engagement is informed by smart service data, you'll see customer satisfaction scores soar.

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Grow top accounts with dashboards across service and sales

It's not just your agents who are lacking true visibility into your business, it's your service leadership, too. And that presents a real problem if you're trying to grow your highest-performing accounts this year. Your leaders can't have a clear picture of a customer's needs unless they can tap into valuable data and insights across the entire company. To make this happen, have your sales and service managers start sharing reports – the ones that analyze sales, service, community, and product data – to help them pinpoint accounts that are likely to grow or churn. Within a single platform, you can create alerts and automate reporting (based on customers' identified service habits) to find high-value customers or new opportunities to sell. For instance, if you see an opportunity to upsell to a high-value customer who has three open support cases, then leadership can flag the account and put the best team on it.

Top-performing service teams are 3.9x more likely to have customized dashboards that track KPIs and align performance metrics across the organization.

Source: Salesforce State of Service Report

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Collaborate across teams to answer every customer question

A customer experience has many touch points – and they're not always smooth. This is a frustrating experience, but it doesn't have to be. To foster a more seamless customer connection, you should get your entire company on board a single internal platform where everyone can swap data and chat in real time about any account, opportunity, or contact record. The goal is that when a customer calls in, your service team has the entire company – and all its customer records – at its disposal. All this easily accessible information and instant communication means your company can now be proactive, reaching out to IT about the latest bugs, alerting sales about a potential new lead, or checking in with operations on logistics. This will solve customer issues faster.

"Salesforce connects our employees and the 1 billion+ people we help every day."

Larry Jones
CIO
Johnson & Johnson

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Personalize customer service with mobile apps and communities

If customers need help, they now try to connect with your company via Facebook, Twitter, text messaging, or self-service communities. And they expect you to be there on the other end of those social and mobile messages to answer their questions. This is why it's imperative that you personalize your customer service with mobile apps and communities. This allows customers who have questions or an open case to access embedded support features in mobile apps and communities, including live chat, video conferencing, knowledge-based articles or community forums. Customers would get the instant support they need with just a tap. Customer interactions are stored in Salesforce so the customer also has full visibility into their case. What's more, they can receive notifications or alerts about the status of their case.

Denys Prykhodov / Shutterstock.com

56%

of service leaders surveyed say they're either already providing or plan to provide service, support, or both via a mobile app for customers within the next two years.

Source: Salesforce surveyed 1,900 service leaders, State of Service Report

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Help customers help themselves

You know what customers like even more than instant communication with service agents? They like the ability to solve problems themselves. According to [Forrester](#), 72% of customers prefer self-service to resolve their support issues over picking up the phone or sending an email to customer service agents. Consider creating communities that connect your customers to each other or that lead them to knowledge-based articles. You can still ensure these cases are automatically logged from the community activity, so that if customers escalate their issues to a service agent, that agent has all of the details they need to help resolve the problem fast.

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Bring all your customer data together to supercharge engagement

We've already noted that service teams have customer data located in disparate and legacy systems, which just takes more work and time to resolve customer issues. But you could opt to easily connect your external data sources to create a 360° view of all customer data, including inventory, purchase orders, product usage, and service history. That way, service agents can pull the most relevant information at the right time from the service console. This kind of easy-to-access customer data and profile means your agents can operate proactively. For instance, agents can find out which customers are VIP and scan inventory to identify product delays and alert the client even before they have to ask.

"Salesforce helps us connect with customers and collaborate with employees in real time."

Mark Moseley
VP of IT
Rosetta Stone

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Accelerate sales and service with a connected customer process

Create a unique workflow so your internal teams, including finance, IT, marketing, or operations can better support service in every customer engagement. You'll be more effective if you create employee apps and automated workflows that are customized to your service needs. You can even give your employees the great experience you offer to customers by creating an internal cases/tickets process. When service agents need help, they can log an internal ticket directly in their agent console and request help from product, IT, marketing, or finance. With service better connected to supporting teams, agents can respond faster to every customer need.

"We're using Salesforce to engage with our members in a way that has never been done before."
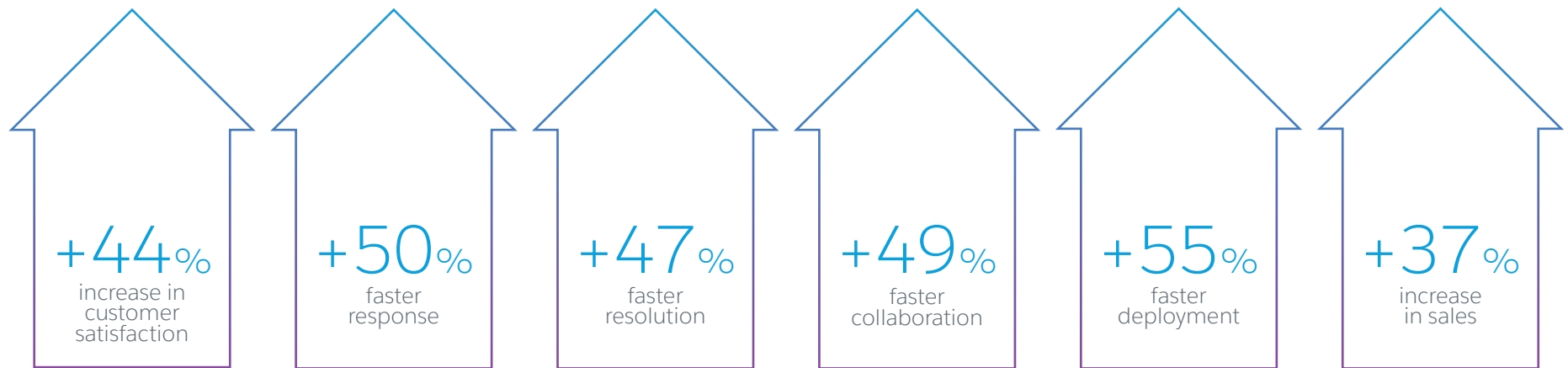
David Kallery
President
Inspirato

Now it's time to get started

We based these 8 strategies on feedback from some of the top-performing companies that are upping the ante when it comes to customer engagement. The new kind of customer journey calls for deeper engagement with each and every customer. But no one team can make that happen alone, which is why these companies are creating new solutions with sales and service together. That's where Salesforce for Customer Engagement comes in. Now you can bring together sales, service, communities, and apps in a single solution, so your business can connect to customers in a whole new way.

Connect to your customers in a whole new way

Customers who use **Salesforce for Customer Engagement** are seeing amazing results:

+44%	+50%	+47%	+49%	+55%	+37%
increase in customer satisfaction	faster response	faster resolution	faster collaboration	faster deployment	increase in sales

Source: Salesforce Voice of the Customer Survey 2015

To learn more about Salesforce for Customer Engagement, **contact us**.

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THE CUSTOMER SUCCESS PLATFORM

SALES SERVICE MARKETING COMMUNITY ANALYTICS APPS IoT