

Creating a connected customer experience

Insights and tips from leading customer experience experts

The Salesforce logo is a blue cloud shape with the word "salesforce" written in white lowercase letters inside it.

salesforce

Three diagonal lines in purple, orange, and light blue extend from the bottom left towards the top right. On the right side, there is a cluster of small, colorful dots in purple, orange, and light blue.

Your customers are connected...

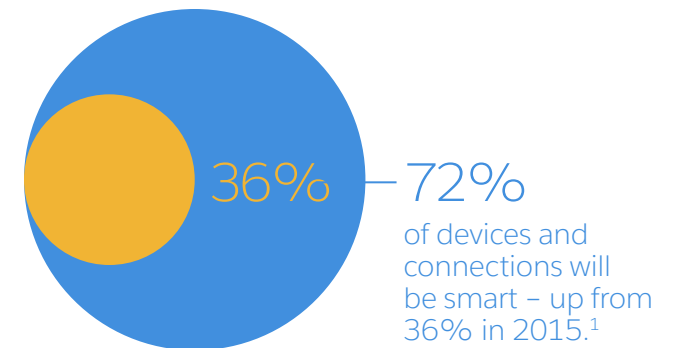
Today, human beings are connected like never before. And those connections are multiplying at an extraordinary rate.

It's predicted there will be 5.5 billion mobile users by 2020, representing 70 percent of the global population. What's more, 72 percent of their devices and connections will be smart – up from 36 percent in 2015.¹

At the same time, everything is getting connected too. Cars, cameras, consumer goods – the list of 'things' that can send you timely information about your customers and their experience is getting longer by the hour. Gartner predicts that this year, 5.5 million new things will get connected every day.²

The result of this super-connectedness? More customer interactions, and higher customer expectations. More than ever, every customer is on their own unique journey with your organisation – through myriad possible touchpoints. In this new world, you can't underestimate the importance of customer experience.

Whether you're interacting through email, Facebook, Twitter, Instagram, or your own app, over the telephone in your call centre, or face-to-face in your retail store, customers expect an experience that's smooth, consistent, and mapped to their needs.



¹ https://newsroom.cisco.com/press-release-content?articleId=1741352#_ftn2

² <http://www.gartner.com/newsroom/id/3165317>

...And you need to be connected too.

Delivering those connected customer experiences means you need to get connected too.

It means breaking down data, department, and channel siloes and enhancing the customer experience with technology. It means uniting everyone around customer satisfaction and success.

It means becoming a *connected customer company*.

But...

- Where do you start?
- Who should be involved?
- How can you drive engagement?
- What metrics should you track?
- Who's getting it right?
- How do you stay connected as channels multiply?

We asked two leading lights of the customer experience world for their expert advice.

Meet the experts



Tim Wade

Tim is Managing Partner at Smith and Co., the leading customer experience consultants whose client list stretches from Burberry and Waterstones to Symantec and PayPal.

He's also an international speaker on multi-channel customer experience, storytelling, brands and marketing, and he draws on deep experience working with some of the biggest names in the retail, financial services, telecoms and hospitality industries.



Rod Sheriff

Rod is a creator of award-winning customer experiences.

In 2015, after years working with world-leading companies on customer experience design, he founded his own company, In-Gage.

In-Gage's starting mission is to make 200 companies legendary for service by 2020 – and it's off to a flying start with the In-Gage Salesforce App, training programmes purpose-built to accelerate change, and strategic consulting services.



Where do you start?

Where do you start?

Start with your customers, says Tim.

“The key is to understand what’s important to *your* customers. You need to know what they value and care about, as well as what’s driving retention and recommendations. And then you need to look at differentiation.

Looking at what’s going to differentiate your customer experience is absolutely crucial. If you deliver your customer experience through the same channels as everyone else, in the same way, you’re just going to become one of many.

The key is to creating a customer experience that’s unique to you.

Ask the following questions:

- What does our brand stand for? What’s its overarching purpose?
- How does that match up against the values and purpose of our competitors?
- How does it match up against those of our comparators, even if we’re not in direct competition with them – if you’re in online retail, people are benchmarking your experience against Amazon, regardless of what they’re buying.”

Where do you start?

Think systems, metrics and training, says Rod.

“To start driving connected customer experiences, you need three things – the right systems, the right metrics, and the right training.

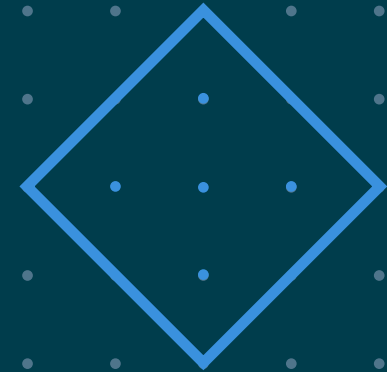
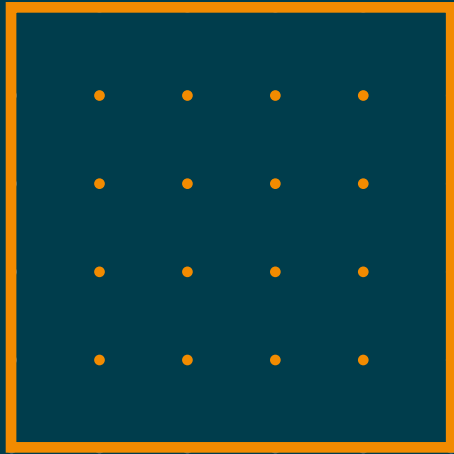
You need a system of record that lets any employee pick up a conversation with any customer, and understand ‘OK, here’s what’s happened so far, and here’s the next step to be taken.’ Salesforce does this excellently by creating a single view of the customer.

Your channels are just different ways of accessing the conversation that’s happening inside the system.

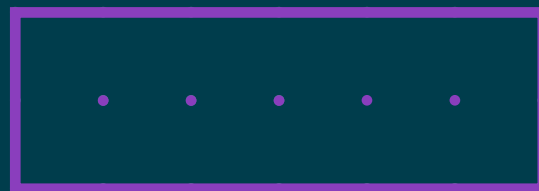
Then come the metrics. These should be chosen to measure the consistency and quality of customer interactions, and ideally be fed back to staff in real-time to help guide and correct processes and behaviours.

Once your metrics are in place, you need to train your staff to get an ‘A’ on them – building an engaged and aligned workforce that delivers a consistent experience, whatever the channel.”

SYSTEMS
METRICS
TRAINING



Who should be involved?



Who should be involved?

Absolutely everyone, says Rod.

“Keeping customers that have been hard won by your marketing and sales efforts is the concern of everyone in the organisation. Everyone.

You set up a business to serve, look after and grow customers. That’s what the whole business is there to do. Operations, for example, are there to deliver on promises made, and support customer growth. If they don’t perform, it hurts the customer.

It’s surprising how many businesses and departments forget this, and end up far too task-focused.

Finance also needs to be involved in the discussion – it’s the only way to ensure funds are efficiently allocated to maximise customer acquisition and loyalty.”

EVERYONE

Who should be involved?

Tim agrees...

“You shouldn’t departmentalise customer experience. If you make delivering a great customer experience the responsibility of marketing, or your customer service team, it stops being a strategic effort and becomes a tactical one.

And for any customer experience effort to be truly successful, it needs to be strategic and companywide.

Organisations tend to excel at connected customer experiences when their leadership recognises it’s a key differentiator and business driver. That’s when you get a culture that’s all about the customer – where no matter whether you’re in marketing, operations or sales, there’s a common sense of what you’re trying to achieve.

Creating that culture is particularly crucial as the average tenure of leadership shortens. If the purpose and culture is stronger than any one person, it doesn’t matter if anybody leaves.

A great example is Disney. They defined their purpose over sixty years ago, and it’s still strong, and still guiding them as an organisation today.”



Making the connection... at Virgin Media

Virgin Media wanted to grow its consumer business and deliver an outstanding buying experience with personalised, integrated and consistent interactions across its many channels.

The UK broadband, television, home and mobile phone provider implemented Salesforce to support its buying experience and create a truly joined-up, omni-channel approach – that links its website, call centres, door-to-door sales and retail stores. It's now able to:

- **Share** data across all departments and channels for an accurate, up to date, 360 view of the customer interactions with Service Cloud
- **Personalise** customer experiences and communications with Marketing Cloud
- **Optimise** contact strategy, channel effectiveness & ROI with Analytics Cloud
- **Digitise** field sales operations with App Cloud
- **Connect** sales teams to the rest of the company with Chatter

“We want to deliver a brilliant customer experience, but we want that brilliance to extend to our prospect experience too [...] Our prospects don't think of Virgin Media online, Virgin Media telesales or Virgin Media retail. They just think of Virgin Media and expect to have a joined-up experience. With Salesforce, we can deliver these great sales interactions; enable our brilliant sales people to have even better, more informed sales conversations; and hopefully provide an experience that means more of our prospects choose to become customers.”

**Christopher Coleman, Head of
Multi-Channel Sales, Virgin Media**

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Christopher Coleman

Head of Multi-Channel Sales, Virgin Media

How do you drive engagement?



How do you drive engagement?

Tim explains why you need to win the emotional case...

“Transforming customer experience is a long haul, and you can’t do it alone.

In my previous job as Marketing Director for Best Western Hotels, we worked to reposition the brand in the UK around the idea of ‘hotels with personality’, and create a customer experience to match. The road from initial strategy creation to ultimate sign off took two years – it really is a journey that you have to take people on.

That means you need to win the emotional as well as the rational case. People will always pick holes in rational cases. But if they’re bought-in emotionally to improving customer experience and customer-centricity, you’ll find making the business case becomes easy.

Marketers talk a lot about engaging emotionally with customers, and then when it comes to our internal audience, we suddenly start relying on rational arguments. Really, we’re all humans making emotional decisions far faster than we’re making rational ones – you have to think about your internal audience as you would your external, and market to them in a subtle emotional way.

Taking everyone on that journey is well worth it. Seeing the returns we achieved in terms of customer satisfaction, employee engagement and profit at Best Western – and being able to prove it, end to end – was a brilliant feeling.”

How do you drive engagement?

Rod reveals how to get the most from your service agents...

“After you’ve put your systems and metrics in place, empowering your service teams is essential. If they can act like they own the business, they’re going to make the right decisions 99.9% of the time – doing the right thing by the company and the customer.

The other key element to the frontline team is the first tier of managers. Your managers need to support and develop your service agents. Organisations often get this wrong. They see these managers as police force, rather than a team dedicated to supporting and developing their agents.

To make sure the team’s being looked after in the right way, you’ll want to metricate team engagements – I believe this is just as important as tracking customer feedback.

Finally, the leadership needs to keep everyone focused on the key outcomes of customer growth and loyalty, co-ordinating each department on a common system (such as Salesforce) and set of metrics (such as In-Gage) that tracks the customer through their lifecycle.

The better your system for joining your employees together the more co-ordinated the customer experience will be. McDonald’s is a great example of this – their systems and processes generate a consistent experience around the world, all with a workforce of teenagers.”

99.9% of the time doing the right thing by the customer.

What metrics should you track?



What metrics should you track?

You've got to pay attention to employee satisfaction, says Tim.

“I'm with Richard Branson on this one. He's got a very simple view of how to measure the performance of his business: if people are happy and passionate, then customers are more than likely to feel the same.

When it comes to customers, net promoter score remains a good one. It has its critics, and its challenges, but it's a good metric to galvanise an organization around. You'll also want to look at loyalty and retention.

Measuring this means building a scorecard of leading and lagging metrics around employee experience and customer experience, linking behaviour and commercial outcome.

Always remember the service-profit chain: great leadership leads to great employee experience, which leads to a great customer experience. And that leads to greater customer loyalty, and greater profit.”

On the employee side, metrics around satisfaction and experience – like staff turnover – are absolutely key.

EMPLOYEE
SATISFACTION

What metrics should you track?

Profit is crucial, says Rod.

“There are three key customer-centric metrics to have in place: first contact resolution, net promoter score, and quality audits for consistency.

But there are two more metrics I believe are needed to have a great – and sustainable – customer experience. One is employee engagement, to help ensure everyone is managed and motivated in the best possible way. The other is profit.

When times get hard, your customer experience programme is the first thing your CFO will cut. Linking customer experience to the financial benefit it delivers to your organisation will help ensure its survival.

You can do this by understanding how much a customer is worth to you in terms of future revenue, and then tracking customer loyalty and advocacy. Even small increases in loyalty can add up to large financial returns.

We built the In-Gage Salesforce App to help organisations track all these metrics in consistent and scalable way, and report back the financial return in real-time. Succeeding in them hits the triple bottom line – it’s great for customers, great for employees and great for the business.”



Making the connection... at Zurich UK

With FutureYou, its digital solution for workplace retirement planning, Zurich is revolutionising the pensions business in the UK by engaging with its customers, cutting through financial jargon, and providing relevant, personalised information.

FutureYou creates a personalised customer journey for each customer from the moment he or she engages via the company's website.

With the help of Marketing Cloud, customer-facing content can be created, tested, and measured quickly and easily. For example, instead of spending weeks on customer newsletters, the marketing team can distribute content in a matter of hours – and see results immediately.

The customer onboarding process has also been streamlined and personalised with Marketing Cloud. When it launches a new corporate pension, the FutureYou team sends a series of tailored welcome emails to every individual in the scheme.

And with Service Cloud, Zurich's navigators can immediately identify a customer, explore how he or she has engaged via the FutureYou site, and understand any issues that customer has had in the past.

“The idea of traditional marketing segmentation is dead [...] We want to provide every customer with a completely unique experience.”

Russell Fisher

Head of Customer and Digital Strategy at Zurich UK

The background is a dark teal color with a light teal grid of small dots. Three lines are drawn across the grid: an orange line starting from the left and going up-right, a purple line starting from the top right and going down-left, and a light blue line starting from the bottom right and going up-left. The text "Who's getting it right?" is centered in white.

Who's getting it right?

Who's getting it right?

Tim picks an iconic fashion brand, and a good night's sleep...

“One company that stands out for me is Burberry. They're thinking about customer experience in the right way – starting with it as a strategic aim.

Instead of saying, ‘we need to be digital or omni-channel’, they're saying ‘we want to deliver a better customer experience, and the way we do that is through connecting people digitally and telling stories, it's through how we present our catwalk show on social media’.

So while we've helped Burberry create connected, digital experiences, the real beauty is how those digital experiences interact with their physical retail experiences, bringing the story alive.

Another company we've been working with is Premier Inn. With them, it's about how everything they do fits into their overarching purpose of giving a good night's sleep to their customers. People, products, processes, technology – everything links together to deliver that good night's sleep.

Ultimately, the companies getting connected customer experiences right are the ones making strategic choices about where to invest first. You may not need the perfect website, mobile solution and social media strategy all at once. You may want to focus on the key areas that are going to differentiate your service.”

STRATEGIC
CHOICES

Who's getting it right?

Rod tells the true story of Truphone...

“Truphone are a global mobile telephony provider, selling and serving in ten countries worldwide. They needed to provide a consistent experience for customers across those geographies, and across a lot of different channels – from phone and text, to email and social.

So they put Salesforce at the heart of their customer experience, added the key metrics, and trained their people to hit them. They made it clear that the way to do better in the organisation was to be better at those metrics. And that has led to some brilliant customer experience stories.

There was one customer who flew from Australia to Hong Kong, and arrived to find they had lost their phone somewhere on the way. Their colleague phoned the Australian Service Delivery Manager, who mobilised Truphone's team in Portugal to redirect the customer's numbers to a brand new SIM in Hong Kong.

A Service Delivery Manager in Hong Kong then provisioned the SIM, put it into a new handset, and went out and met the customer as they were leaving the airport. They took them to lunch, and handed over the brand new phone.

That's a fantastic experience, and a fantastic story. But what makes it even better is that the story was shared socially through Salesforce Chatter. So everyone – from myself, to Truphone's teams in America, the Philippines and beyond – heard about it too.

That's how great experiences become a benchmark for right behaviour. That's how they become self-sustaining – because you hear that, and want to create something great too.”



How do you stay connected
as channels multiply?

How do you stay connected as channels multiply?

Learn to prioritise, says Tim.

“If you’ve embedded customer experience in your organisation and know how it differentiates you, you’ll make smart, tactical choices about where to invest when new channels arrive.

The key is to choose the right strategy for your organisation – whether it’s to be light touch and digital like Amazon, or to provide more human contact, and deeper, more personal relationships.

My advice? Don’t try to become good at everything. If you try to jump on each new bandwagon, you’ll rapidly become a busy fool.”

Be ready to serve the AIs, says Rod.

“People have started talking about AI being the next big thing in customer experience – with companies using AI to solve customer problems.

I think we’ll see a different challenge, as AIs that live on customer devices start contacting companies to solve problems on the customer’s behalf. In the future, we’ll need to be able to serve these AIs, or they’ll be the one that determine the next best action.

In terms of focusing your efforts as more channels spring up, it’s a case of looking at your customer base and who they are. But if you do open a channel, you need to be excellent at it.”

CONCLUSION

Getting yourself connected

Or how to improve
customer experience
and satisfaction

Today, your customers are connected like never before.

If you're going to deliver the kind of seamless, smart experiences they expect, your organisation needs to get connected too – uniting staff around shared systems, metrics and goals.

It's a big step. But it's a crucial one. And you don't need to take it alone.

The Salesforce Customer Success Platform can provide the foundation for connected customer experiences, bringing sales, service, marketing and apps together in a single, seamless solution.

Want to know the impact a service investment can make on your business? Use our ROI calculator to find out.

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CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY



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