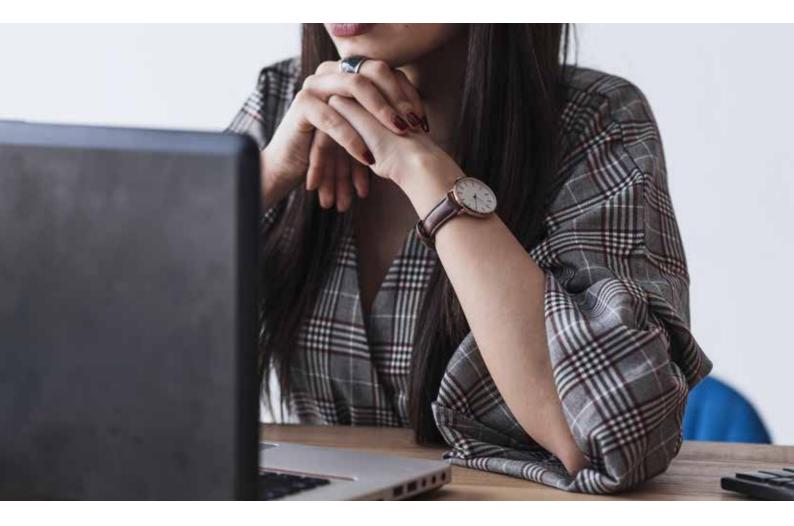**Workbooks.com**

CRM
*for Customer
Service*

Customer experience has never been so important. In its "Customer 2020" report, consultancy Walker states that in just two years' time – in 2020 – customer experience will be the leading brand differentiator when it comes to a buying decision, leaving behind such criteria as product and price.

In an advanced market where there is little to choose between rivals on product features or cost, and where consumers have become immune to marketing messages, customer service comes to the fore. This trend is exacerbated by the rise of Customer 2.0. These customers have online access to product information and reviews, are able to conduct detailed research into their options before entering a buying process, and are eager to post reviews of their experience with your brand. Where once customer service was seen by many firms as an outlet for customer complaints – an unfortunate but necessary burden – today it is fast becoming a critical source of competitive advantage.

CRM has long been recognized as an important tool for customer service, but in this new environment, where a growing number of firms are looking for ways to go above and beyond expectations and deliver a great experience, many are looking afresh at their CRM platform. They are discovering exactly how it can help them gain that competitive advantage.

INFORMATION,
Ownership and Routing

For many customers the ideal outcome is a solution to their problem or an answer to their question without having to speak to a customer service agent.

For this group, a CRM platform enables online self-service. The organization can post solutions to common problems on its site and customers can quickly and easily search there for solutions and guidance. This can be updated and improved over time as new problems and solutions arise.

This alone reduces the burden on the customer support team. But it is only the beginning of the ways in which CRM can help improve the customer experience. For customers who prefer to contact the organization and speak to someone, it delivers a faster, higher quality, and more consistent solution to their problems in three key ways: information, ownership and routing.

1. Agents themselves have access to the knowledge bank. There they can find information on previous similar cases or articles that are relevant. This gives them the information and expertise they need to provide high quality, useful advice to customers. For live cases, the team can keep track of cases, and get a clear view of their relative priority and impact. They can see at a glance all notes and investigations through to resolution. It offers a seamless sharing of information between agents, and increases the chances of a rapid, accurate resolution.

2. CRM helps deliver greater ownership of cases. Rather than individual cases moving between lines of support, with a CRM platform in place, cases can be dealt with in batches at certain times of the day, so that the same person handles it each time. This removes the frustration customers feel at having to explain the issue afresh each time, and again it increases the chances of a rapid, accurate resolution.

3. CRM can build an ever-increasing picture of agent skills and knowledge, and so enable the automatic routing of cases to the agent best qualified to resolve them. Yet again this increases the chances of a rapid, accurate resolution.

What is more, CRM delivers these improvements to the customer experience in a multichannel environment so that cases and learnings are shared between web, phone, email and chat. **Today's customer expects a consistent experience regardless of the channel they use. It is no longer a selling point; today it is expected.**

Turning Round
TRUSTPILOT
REVIEWS

These are not merely theoretical improvements. Organizations are experiencing them day in, day out. To give just one example, we recently worked with one organization that had no CRM in place. It was using Outlook to handle over 4000 queries a week, and they could not cope any longer. The customer experience was so dire the company had to turn off Trustpilot – the reviews it was receiving there were causing significant damage to the business.

The issue came to a head with its preparation for Boxing Day sales following hot on the heels of Black Friday. The company decided it needed a better system in place to handle customer service queries in this period. They installed Workbooks CRM and set it up to identify keywords in customers' emails so issues were routed to the right agents, and agents were no longer able to cherry-pick the easier cases.

The firm had a large volume of queries, the installation of the CRM enabled the team to handle it well, and begin to improve the brand's customer satisfaction scores.

Happier
AGENTS

Those are the direct impacts deploying a CRM platform can have on customer experience. There are other benefits, which although indirect, are in many ways even more significant. When a customer contacts a firm, by far the single most important factor determining the quality of that customer's experience is the person they interact with.

Happy customer service agents make for happy customers, and a CRM platform helps make agents happier in several ways. It drives the simple, repetitive queries to the website so agents spend less time answering the same boring question over and over again. Ask customer service agents about their frustrations and that is the one they cite more than any other. A CRM platform rapidly elevates their role so they are spending more time answering interesting, challenging queries. They become experts and can truly add value to the customers.

A CRM platform also allows the organization to route calls to the most appropriate agents, balancing workload across the team and ensuring cases are progressed appropriately. Without a CRM platform there can be a tendency to focus on the customers who are shouting the loudest - cases from the quieter customers can be left open for too long. Or, another common issue is agents cherry-picking easier ones so they can demonstrate a high number of closed cases – more difficult, complex cases get left unresolved for long periods of time.

The CRM platform presents cases to the right agents at the right time, based on the rules you decide.

Efficiency
SAVINGS

There are also significant efficiency benefits. If customers can resolve queries online there are fewer queries to the customer service team. Happier agents stay longer, becoming customer service experts and developing careers, so recruitment and training costs are reduced.

Drawing all channels together in one place – the CRM platform – reduces duplication of activity. General knowledge and specific case information can be shared across channels so that what is learnt by the webchat team is immediately known by agents on phone, email, social, and live chat.

This is also the case across functions. For example, before installing a CRM platform it is common to see salespeople or account management teams, for example in B2B, approaching the support desk to ask for help with a customer. A CRM platform eliminates the need for this.

It is a small process improvement but the aggregation of these marginal gains typically adds up to significant savings for the organization.

Integration
ACROSS ORGANIZATION

A CRM platform can have an impact beyond the customer service platform in a way that positively affects the customer experience.

It gathers insights from customer engagement which can be used to inform the product roadmap strategy. If a product attracts a high volume of queries perhaps you should look at ways to improve it or scale back its distribution. If one attracts fewer, perhaps that influences your new product development program.

The sales and marketing teams can gain so much from CRM. It allows the sales and marketing teams to automate a lot of their activity, focussing their efforts less on low-level repetitive campaigns and more on tailoring content for specific segments or individual customers. It can provide them with valuable insights in the form of either aggregated feedback gathered via surveys, or by measuring performance against service level agreements. Especially happy customers can even become brand advocates. Both the measurement and the advocacy are possible without CRM, but both are made far easier by CRM.

Finally, CRM also helps with financial forecasting. Customers can be rated red, amber, green, or in some other way – perhaps they can given a daily score based on risk factors – so that revenue loss can be predicted more accurately and the business can plan accordingly.

Beyond
SERVICE MANAGEMENT

Many support desks rely heavily on a service management system to log and manage cases. These tend to be useful only for dealing with live issues. Once issues are resolved they are not recorded, so the organization never builds an overall picture of what is working and what needs improvement.

A CRM platform also gives you a broader view that helps with better decision making. You get an instant view of the finance situation. You can see the previous interactions that the customer has had with the business, from responses to marketing campaigns to contacts within the buying cycle etc. Very often the root problem is not poor customer support, it's that they were sold or marketed the wrong product in the first place. Logging everything onto one CRM platform allows you to look back, and firstly offer the disappointed customer a more suitable solution, then secondly improve what sales and marketing do in the future.

By logging issues onto a CRM platform you can make sure you resource it properly. It also offers an easy-to-use interface, produces complex, insightful reports, and integrates with your phone system.

A growing number of organizations are concluding that on closer inspection, a CRM solution is not the same as a service management system – and many are finding CRM a more useful fit for their business.

So, finally, how do you get a CRM platform integrated with your customer service operation? It is crucial to think carefully about this – when CRM solutions do fail, it is typically because not enough care and attention has been paid to the implementation. Follow these six steps to get it right for your organization.

1. MAP OUT CHANNELS

Begin with a detailed assessment of the queries that come in through each of your channels. Without this clear view of demand it will be difficult for you to design a solution to manage it all. Which channels do they come through? Leave one out and you will not be using your CRM as effectively as you could.

2. UNDERSTAND QUERIES

In the same way, get a picture of the type of queries you handle. What topics do they cover? What is the split between complex and simple queries and how do you plan to treat each? Is there tiering to consider? If you offer different levels of service to different customers this should be factored into your CRM set-up.

3. KNOW WHAT YOU WANT TO MEASURE

It may be your net promoter score, or responses to a specific customer satisfaction survey, or performance against service level agreements, or the ratio of open versus closed cases, or the number of cases by time window, or the gap between first and final resolutions. Each metric will tell you something different about performance in your customer service team, so know what matters to you and focus on that metric.

A common error is to offer too many options on a pick list - agents just pick the first one. Find a balance between simplicity and comprehensiveness.

4. PLAN AGENT TRAINING

It is essential to train agents on the new system. Not only does this ensure they know the practicalities of how to operate it, but it also helps build their enthusiasm for doing so – resistance to change is a major obstacle in the implementation of any new technology.

For most organizations however it is challenging, if not impossible, to take the entire support team offline for an entire day. So, create a plan for phased training.

5. PLAN DATA MIGRATION

Prior to a CRM implementation data in most organizations is messy. Drawn from a host of different sources, it sits in multiple formats in different places across the organization. Duplication, inaccuracy and redundancy are rife.

To get it from this state to one where there is a single view of all data held in one place and accessible by everyone from anywhere any time is no small undertaking. Once done it adds greatly to the organization, but to get to that point takes a plan and an investment of resource.

6. BRING TOGETHER THE RIGHT PROJECT TEAM

The most successful CRM implementations involve a committed team from across the organization. Start with this team in place and they will help you put together an effective plan and then deliver it.

Get this right and your CRM platform will help you deliver a customer experience that drives competitive advantage and commercial results for your business.