

CRM FOR
CUSTOMER SERVICE
Transport & Logistics

Customer experience has never been so important. In its “Customer 2020” report, consultancy Walker predicted that in 2020 – customer experience would be the leading brand differentiator when it comes to a buying decision, leaving behind such criteria as product and price.

In a competitive market like logistics, where services and cost can be similar across rivals, and where business decision making relies on SLA's being met, customer service comes to the fore. This trend is exacerbated by the rise of Customer 2.0. These customers have online access to information, are able to conduct detailed research into their options before entering a buying process and are eager to read and 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 recognised as an important tool for customer service across many industries, but in the new, more digital environment, a growing number of transport and logistics firms are looking for new ways to go above and beyond expectations and deliver a great experience. Today, transport companies are looking afresh at how CRM can support them and how it can help them gain that competitive advantage.



INCIDENT MANAGEMENT, *Ownership and Routing*



For many customers the ideal outcome is a rapid 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 in the form of customer portals. By providing guidance around common queries, as a knowledgebase your customers can quickly and easily search for solutions and guidance and log their issue accordingly e.g. missing or damaged shipment. The ability to monitor the portal in real-time ensures that information is always up to date.

This alone reduces the burden on your 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 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** Your customer support team can access and also update 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 incidents, the team can keep track of issues, 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 support agents, with a CRM platform in place, incidents can be dealt with in a consistent manner, so that the same person handles all related incidents. 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 urgent problems 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 customers expect a consistent experience regardless of the channel they use. It is no longer a selling point; today it is expected.**





Building Great **TRUSTPILOT REVIEWS**

These are not merely theoretical improvements. Organisations are experiencing them day in, day out. To give just one example, we recently worked with one organisation that had no CRM in place. It was using Outlook and Excel spreadsheets to handle thousands of queries a week, and they could not cope. 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 brand and business.

The issue came to a head with its preparation for Black Friday and Christmas. The company decided it needed a better system in place to handle customer service queries. They installed Workbooks CRM to streamline their customer service operations, drive agents' efficiency and effectiveness and help the routing of cases to the right agents based on customer incidents etc.

The installation of the CRM enabled the team to handle all the incoming queries and begin to improve the brand's customer satisfaction scores.



Happier Customers **MORE LOYAL STAFF**

There are multiple direct benefits of CRM for customer service, but often our customers report many indirect improvements, which, 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 impression of person they interact with.

Happy, enabled staff make for happier customers, and a CRM platform helps make employees happier in several ways. It routes simple, repetitive queries to the website or knowledgebase, where customers can find the most up to date shipment information. Ask your customer service agents about their frustrations and having to continually look up the same information for customers is the one they cite more than any other. A CRM platform rapidly elevates their role and they can focus on adding value for customers.

A CRM platform also allows the organisation to route calls to the most appropriate team, balancing workload across the business and ensuring incidents are resolved appropriately. Without a CRM platform there can be a tendency to focus on the customers who are shouting the loudest - issues logged by quieter customers can be left open for too long. CRM enables transport firms to set priorities around agreed customer SLA's ensuring that customers receive the level of support that they're paying for.

A CRM platform can route incidents to the right team at the right time, based on the rules you decide.



Efficiency AND SAVINGS



CRM can also bring significant efficiency benefits. If customers can log queries and even resolve them online there should be fewer cases raised to the customer service team, freeing them up to work more proactively on supporting customers. Happier employees also stay longer, becoming customer service experts and developing careers, so recruitment and training costs are reduced.

Drawing all channels together in one place – with CRM as a hub – reduces duplication of activity. Any updates and specific case information can be shared across channels so that what is learnt by the customer service team is immediately shared by agents on phone, email, social, and live chat.

This is also the case across functions. CRM connects all teams and roles around a single-view of the customer. Your customer services, sales, operations and transport teams can collaborate more quickly and respond to customer needs.

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



Information ACROSS THE BUSINESS



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 business strategy. If a service attracts a high volume of queries perhaps you should look at ways to optimise the business opportunity. You can also track customer relationships, if a particular account has stopped booking your service is it time to find out why?

The sales and marketing teams can gain significant benefits from CRM. Marketing teams are able to automate some communications within a workflow, focussing their efforts less on low-level repetitive campaigns and more on tailoring content for specific accounts or groups of 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 and efficient by CRM.

Furthermore, CRM also helps with financial forecasting. Customers can be categorised or tiered e.g. 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 more effectively.



So, finally, how do you get a CRM platform integrated with your customer service, sales and transport management teams? It is crucial to think carefully about this – and consider who will need to access the CRM on a daily basis. Follow these six steps to get it right for your organisation.

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 STAFF TRAINING

It is essential to train your team 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 organisations 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 organisations is messy. Drawn from a host of different sources, it sits in multiple formats in different places across the organisation. 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 organisation, 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 organisation. 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.

