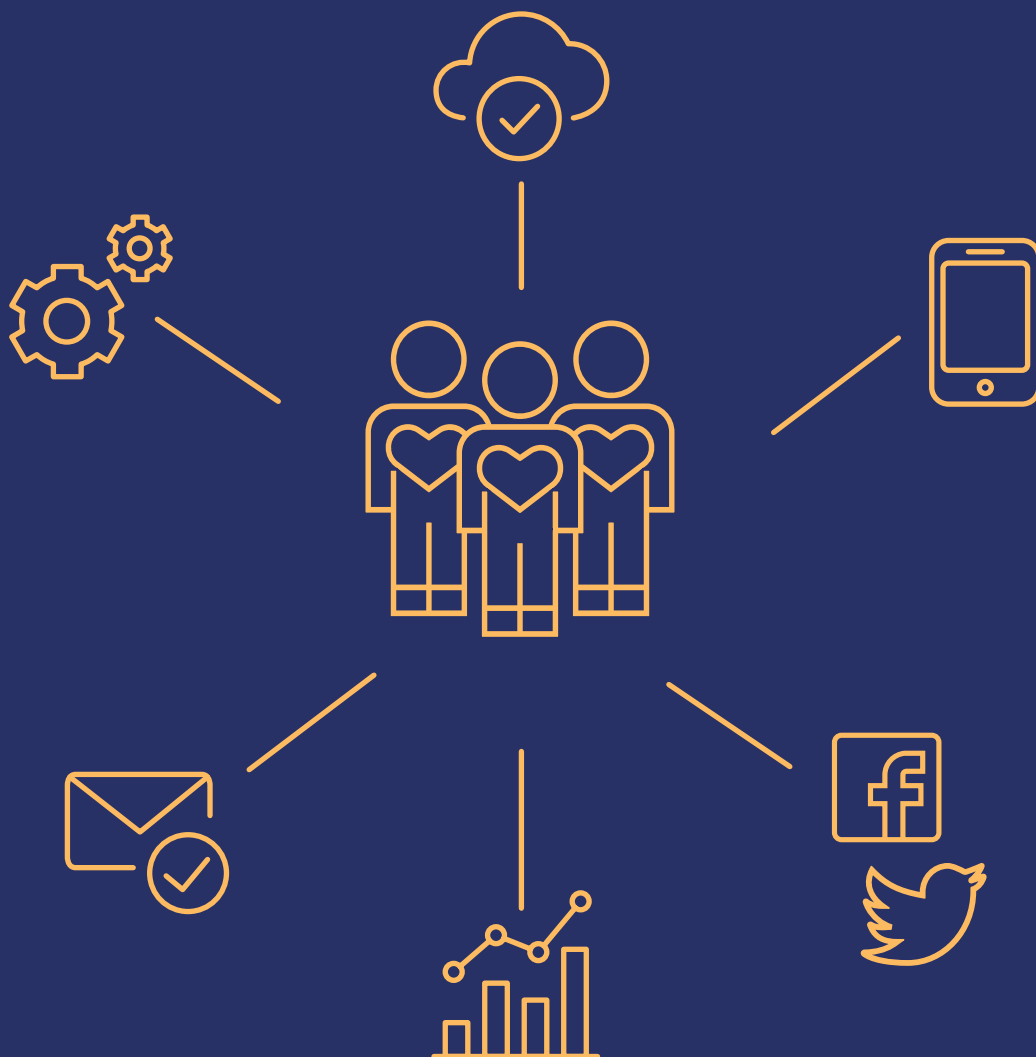**Workbooks.com**

4 WAYS
IT SOLUTION PROVIDERS
CAN GET MORE FROM CRM

Opportunity 3:
EMBRACE CUSTOMER EXPERIENCE

Customer Experience
A KEY MEASURE OF SUCCESS

For high-tech businesses delivering an outstanding customer experience (CX) is a business priority. Providing great customer experiences creates more loyal customers and in a competitive market can also be a way to differentiate your products or services, it can even lead to increased shareholder value and higher stock prices.

One of the primary KPIs connected to customer satisfaction is the Net Promotor Score (NPS), enabling your customers to be surveyed on a regular basis and collating their feedback can also be simplified using survey tools in CRM.

The Net Promotor Score®

Calculate your NPS by asking one key question and a 0-10 point scale.

"How likely is it that (your customers) would recommend your brand or service to a friend or colleague?"

Respondents are then grouped as follows:

Not at all likely					Neutral					Extremely likely
0	1	2	3	4	5	6	7	8	9	10

Detractor	**Passive**	**Promoter**
(score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.	(score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.	(score 9-10) are loyal enthusiasts who will keep buying and refer others, fuelling growth.

% PROMOTERS - % DETRACTORS = NPS (NET PROMOTER SCORE)

Subtracting the percentage of Detractors from the percentage of Promoters yields the Net Promoter Score, which can range from a low of 100 (if every customer is a Detractor) to a high of 100 (if every customer is a Promoter).

Net Promotor Score and NPS are Trademarks of Bain & Company

However, despite this evidence very few technology companies are taking full advantage of the benefits that CRM can bring to measuring and managing CX. CRM provides a 360-degree view of every customer interaction between marketing, sales and customer support which means that you remove the communication challenges which occur where customer information is not shared accurately between teams.

To enable great customer service it's critical that sales, marketing, account management and customer success teams are aligned and able to work in unison. Having shared access to all account details; including activities planned by others, ensures a more co-ordinated approach where any problems are quickly identified and resolved by knowledgeable, motivated, support agents.

COULD YOUR CX PROGRAMS PERFORM BETTER?

✓ Do you have a robust and effective system in place for measuring Net Promoter Score® (NPS)?

✓ Do you know if a customer has stopped – or might stop buying from you?

✓ Does your support team know what type of service contract the customer has?

✓ Do you allocate cases to customer support by simple availability or by more sophisticated routing e.g. expertise?

✓ Are customer case details visible to everyone who might be working on the account?

You may identify with some of these questions, it's not uncommon that systems have not kept up to speed with how customer success programs are managed and measured – but CRM, when leveraged in the right way, can deliver a two-fold benefit – providing account management teams with a system to track projects and proactively manage customers, giving them visibility into the time spent against each project, identifying issues and tracking all documentation and outcomes.

Multi-channel
HAS EVOLVED

Expanding support to include the many ways in which customers expect to contact you can be challenging. Customer support teams need to manage cases via an email inbox, capture enquiries via a Web form, allow customers to log into a web portal and manage cases themselves online, capture chat logs and integrate social media feeds – e.g. monitoring messages sent via twitter, Instagram or Facebook.
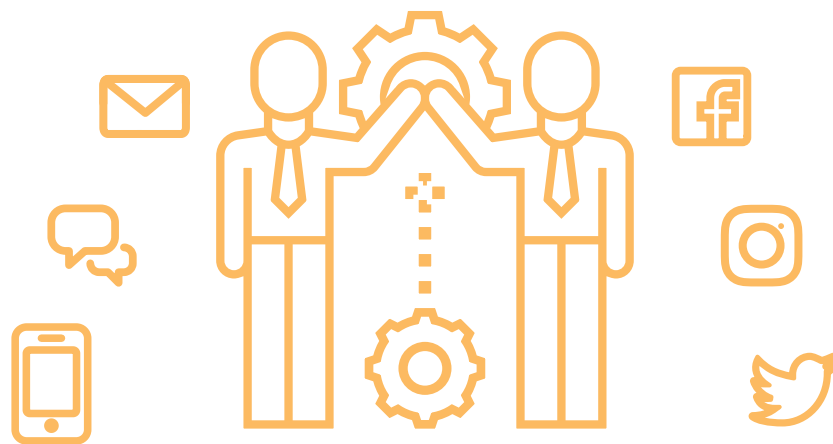
In a perfect scenario, when incidents occur, your support team would automatically be able to create cases and set priorities. They would then quickly assign tickets to individual users or groups, track all emails, notes and activities and synchronize with Outlook, Exchange/Office365 or Google Apps. This makes it far more likely that **the incident will be resolved rapidly, without any lasting damage and maintains a case-history for future reference.**

Managing Service Level Agreements (SLA) can also be a complex, time consuming and detailed task. **It can be easy to breach a SLA without even being aware of it,** but CRM allows organizations to manage and track performance in real-time. To help, alerts can be set for the support team to forewarn them if any cases are overdue or about to breach SLAs.

In much the same way, **support surveys, similar to those used to calculate Net Promotor Score (NPS) help firms understand where they need to improve.** CRM can also be used to automate survey distribution for timely online customer service feedback to measure the quality of support, identify areas for improvement and help ensure customer satisfaction at every point of contact.

Customers love
TO HELP THEMSELVES

There's a two-fold benefit to enabling customers to self-serve. Firstly, direct access into their own account information held in a CRM enables customers to source answers, request services or additional licenses, register for training and quickly resolve simple issues without even contacting a support representative.

> Secondly, for your support team, customer self-service means they spend less time dealing with common, repetitive queries and are freed-up to focus on higher value, more interesting activities - which can also improve job satisfaction and the retention of good agents.
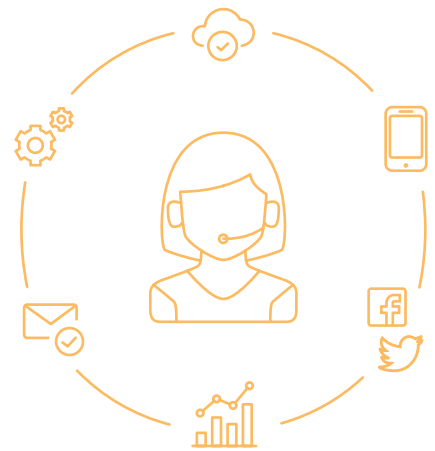
Ensuring Customer Success

Within the technology industry there has been an evolution towards 'Customer Success' – different to customer service or customer support in that the role focuses specifically on customer lifetime value, helping to ensure that customers successfully adopt and use solutions and achieve the expected return on investment (ROI).

Customer success managers have become pivotal to maintaining B2B relationships in IT, they need to manage liaison between multiple business functions and the customer. Therefore, being able to see every interaction, view account health history and visibility of all activities or cases is critical to their role. Enabling Customer Success teams is becoming one of the primary drivers for businesses to review their current CRM system – and particularly to realise the benefit of bringing multiple business functions from marketing through to finance together onto one platform in order to enable a 360-view of the customer.

> Additionally, because customer success managers build an in-depth understanding of how your customers are using solutions, they also provide an invaluable feedback loop back into product and engineering teams helping to ensure that your future roadmap keeps pace with changing business needs.

SUMMARY

Expanding how you use CRM to support your customer success programs delivers multiple measurable benefits.

When customers receive a consistent experience, have access to self-service portals, can communicate across multiple channels and can get the value they expect from your products and solutions this should be reflected in your NPS® score.

The overall result being that satisfied customers renew their licenses - and, in time – you'll even be able to identify which of your customers are most likely to become promotors of your solution and future brand advocates who can help generate future business.
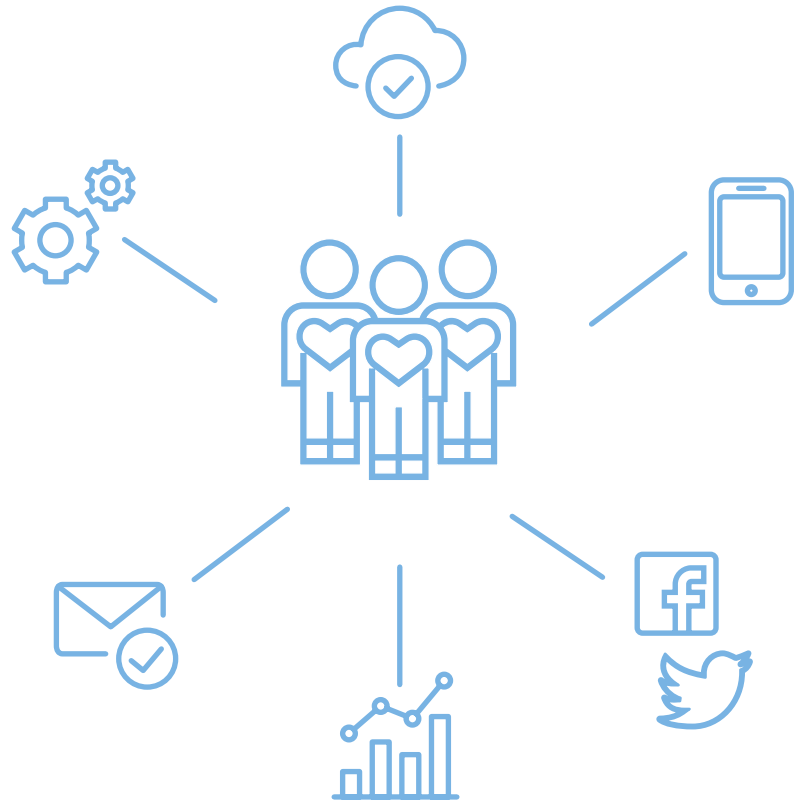
WHY WORKBOOKS?

Designed for mid-sized technology companies
Our CRM solution provides many of the features required by small and mid-sized IT organizations out-of-the-box. The platform is intuitive, and easily configurable to ensure customers get the outcomes they want.

Better value for money
Our CRM license prices are significantly lower than Salesforce and Microsoft Dynamics (50 - 70%). Our implementation process requires fewer consulting days and is better suited to the budget of a typical SME, speeding up time to value and increasing ROI.

A team passionate about your success
Our team develops world class software and delivers all the services to guarantee a successful implementation. Our expertise in the IT industry will ensure you get the right value quickly.