

How to identify your unhappy customers...
before your competitors do!



Introduction

We all know that retaining customers is easier than finding new ones, but do you really know if your existing customers are happy campers, a little bit grumpy or down right mad about the products or services you provide?

At Workbooks we use a simple but effective traffic lights system to keep track of customer sentiment. Customers are marked as either Red, Amber or Green.

- Red:** They are unhappy and at risk of leaving us.
- Amber:** A little unhappy, we need to improve their perception.
- Green:** All is good.

The old adage is that all customers should be treated equally, but this just doesn't make any sense. If you have a large customer who is unhappy, you really should invest more time in getting them back on track.



Using the 5 Traffic Lights System steps

1. Make sure all customer facing staff have access to the traffic lights, including at least Customer Services, Sales and Finance. The last thing you want is a sales rep trying to sell a new product to an existing client, only to find out they are really hacked-off because a customer services issue isn't resolved.



2. Make it easy to find: Make the information front and centre and easy to access. Can a sales rep get it on their mobile just before a customer meeting?



3. Allow anyone to set a client account to Red or Amber and make sure people feel empowered to do so. If the accounts department learns a customer is unhappy while chasing an invoice then encourage them to highlight the issue and set the status accordingly.



4. Make it easy: Don't create a complex workflow to put a customer at risk, a simple dropdown or checkbox on a CRM record should be enough.



5. Make sure you have a process for following up: Nothing is more discouraging for staff (or customers) if they highlight a customer problem and nobody does anything about it.

How Workbooks use their CRM to support these RAG processes

- We have a pick list on an organisation record that anyone can set to Amber or Red.
- We have a scheduled email report which is sent round each day – which automatically notifies management of any customers that have been moved to Red or Amber.
- We use a Case record to track ‘Management Cases’ to ensure they are resolved successfully.
- We have a scheduled ‘At Risk’ meeting every two weeks, where the appropriate people review the management cases and Activities are created in Workbooks and assigned to people to ensure action is taken.

Organisation

Atlantic Computer Services

Main Summary (73) Notes (2) Activities (44) Emails (4) People (3)

Save & Close Save Send Email New Stop watching

Assigned to Daniel Demo

Name Atlantic Computer Services

Category General Business

Industry Media & Entertainment

Website www.atlanticcomputerservices.com

Telephone 01204808859

Fax

Own Organisation Relationships

Partner Supplier

Customer Prospect

Changing these values will create or remove relationships when you save this form. Existing relationships can be opened using the links below:

Customer

Profile

Annual revenue GBP

Number of employees

Account Health Amber

Account RAG

Report

Name ▲	Account Health
Amtico UK Ltd	Green
Anderson Handling	Green
Anderson Human	Green
Atlantic Computer Services	Amber
Atlantic Limited	Amber
Boden and Co Ltd	Red

- We create Scheduled Activities in Workbooks for our Customer Care team to 'check-in' with clients. This ensures all customers are called to see if they are happy.
- These calls are a valuable source of feedback, but they also generate new business opportunities for us, so the results more than compensate for the effort required.

Scheduled Activity

Atlantic Computer Services Consultancy Opportunity

Customer Care Call with Atlantic

Main | Notes (0) | Related Items (4) | Files (0) | EchoSign UI

Save & Close | Save | Send Email | Complete | Watch

Subject: Customer Care Call with Atlantic | Assigned to: John Saunders | Type: Phone call | Status: New | Priority: High

Due Date: 19/01/2016 | Completed date: | Reminder: [checked] | 18/01/2016 9:00 AM | Link to Customer: [checked]

Primary contact details

Name: Alan Whitehead | Telephone: 01204808859 | Mobile: 07856237812 | Email: alan@atlanticcomputers.com | Employer: Atlantic Computer Services

Description

- Customer care call - Speak to Alan to check he is happy.
- Discuss latest enhancements.
- Discuss cases.
- Discuss opportunity for growth of account.

Our CRM system makes managing this customer care process simple and easy for everyone, helping us keep our customers glowing green and not angry red!

“Retaining customers is easier than finding new ones, make sure your customers are happy campers!”

