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Beyond CRM: Managing the Customer Experience

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My last blog post differentiated between basic customer service (CRM) and customer experience (CE). CRM is about marketing and sales, while CE is about being accessible, anticipatory, proactive and engaging across the end-to-end customer lifecycle.

There are four process actions and four technology requirements that must be in place to enhance the CE and maximize the bottom line. These are:

Four Process Actions

1. Identify moments of truth across the entire customer journey.

Create a process map of the current and ideal CE to identify areas needing improvement. The maps should be developed jointly by a team from the marketing, service and technology departments—and include front line staff.

2. The marketing and sales departments must be honest in setting customer expectations.

Proactively communicating about possible problems is a best practice. Part of this is aggressively educating customers on how to avoid problems via short videos.

3. Identify when company operational actions will impact the CE and proactively let customers know.

This strategy is what I call psychic pizza—delivering the information (like the pizza) just before the customer asks for it.

4. Develop seamless processes at each customer touchpoint.

This includes self-service channels. Customers do not want to call you unless absolutely necessary—but they will when the web self-service has failed or you have excessive bureaucracy.

Four Technology Requirements

1. A common customer identifier must exist across the CRM platforms, as well as operational and financial databases.

This allows monitoring the end-to-end CE.

2. Key operational databases must be able to flag and communicate process failures and confirm impending actions.

These event data, using the above common customer identifier, feed both proactive psychic pizza actions and the Voice of the Customer. For example, Amazon can monitor slow movie downloads, apologize and give you a credit before you ever complain.

3. The company's website should be reoriented to balance education and support for the customer with traditional marketing and sales activities.

Most websites are 80 percent sales when 80 percent of visitors are seeking support. Education, support and new customer orientation should all be featured prominently on the homepage—not three clicks inside.

4. Wireless and mobile technology should monitor customer use of products to identify opportunities for more feature utilization.

Most customers are using only a few basic product features because they have never read the directions. Send short videos to the customer on how to use two additional functions—additional utilization translates into additional value.

Getting Started

1. Better a small success than a big disaster

Go for small wins at first. If you do not have a CE journey map, start with one phase that has problems or start at a macro end-to-end level. Address only one or two CE problems to start with.

2. Measure, experiment, then measure again

Measure the revenue and word-of-mouth damage of the top unpleasant surprises and the benefit of delighters. Pick one or two events that you want to prevent or encourage. Experiment with a small percentage of your customer base—then measure changes and impact. Share the results with the finance department—they need to be convinced of the value in an enhanced CE.

3. Do not forget the balloons

Celebrate your success with both customers and employees. News of small improvements will create momentum and give both groups hope that the CE really is going to get better..

Full article:
http://www.forbes.com/sites/salesforce/2014/09/06/managing-customer-experience/