zendesk sell

Optimize your sales CRM to improve customer service

A Walker study found that by 2020, customer experience will overtake price and product as the key brand differentiator. However, according to Gladly's 2018 Customer Service Expectations Survey, even though 71% of customers desire a consistent experience across any channel, only 29% receive it.

Although important for every department, providing an amazing customer experience is a major responsibility of customer support. Unfortunately, **customers expect a consistent experience, but support teams aren't meeting these expectations.**

There are a number of reasons for this, including siloed support, marketing, and sales teams, information that is spread across departments, and overall communication gaps. Your customer relationship management (CRM) software should be optimized to present to each user a complete picture of every customer — from first contact to last sales call, support email, or newsletter open. Use this picture to create a consistent experience and meet customer expectations.

What is a consistent customer experience?

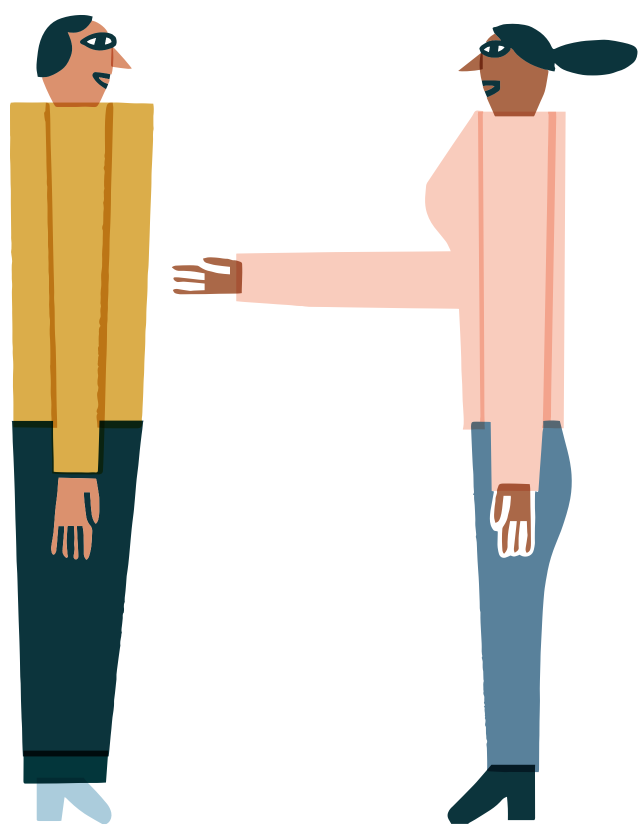
Forrester defines the customer experience as “How customers perceive their interactions with your company.” From emails and phone calls to meetings and marketing materials, how your company interacts with customers on every level shapes how your company is perceived.

The definition of a consistent customer experience could then be ***“how customers perceive their interactions with your company over their lifetime.”***

If a customer’s perception is shaped by conflicting messages from sales, marketing, and support, their experience is inconsistent. An inconsistent experience can lead to customer churn and unhappy customers sharing their negative experience with others.

Companies recognize that inconsistent customer experiences are a problem, but they often go about solving it the wrong way. Instead of analyzing the experience as a whole, they look at how they can improve individual customer interactions.

According to the McKinsey customer-experience survey of some 27,000 American consumers across fourteen different industries, it is more effective to measure customer satisfaction over the customer journey than measure happiness with individual interactions. As the survey details,“Maximizing satisfaction with customer journeys has the potential not only to increase customer satisfaction by 20 percent but also to lift revenue by up to 15 percent while lowering the cost of serving customers by as much as 20 percent.”



To achieve customer satisfaction, companies should pay close attention to three key types revealed in the survey results:

Customer-journey consistency

Many companies have difficulty in offering overall customer journey consistency. While interactions might match by each department, they are broken, for example, when a customer is handed over from sales to support or after the customer has been with the company for awhile — the experience feels completely different for the customer depending on which team member they're talking to.

Communication consistency

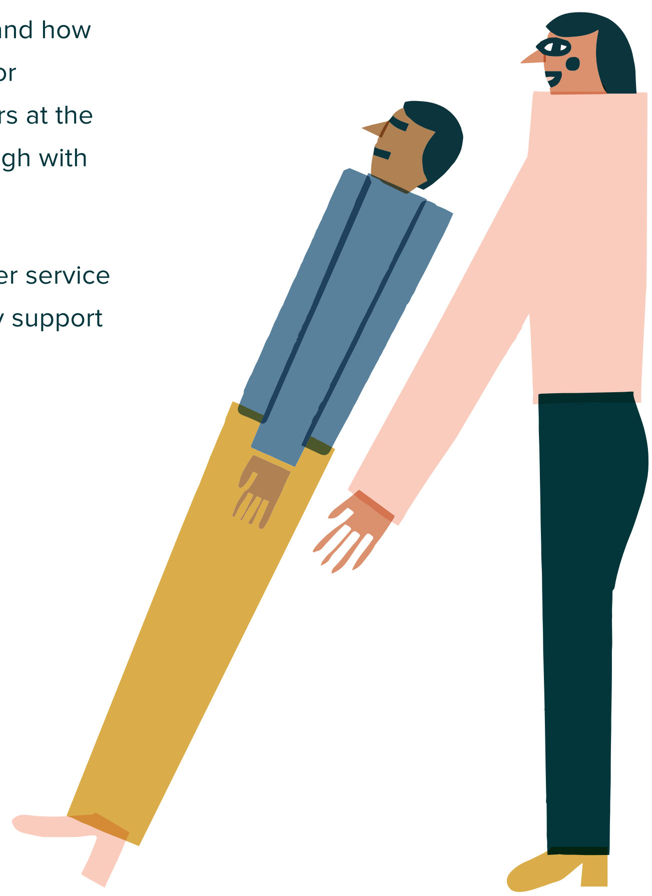
It's important to keep promises that your company makes to your customers. For example, if you include a commitment on your website for service responses in less than an hour, follow through on that promise. However, it's just as vital to ensure that customers know that promises were met so their perception is a positive one. When communicating with customers, highlight the delivery of promises kept.

Emotional consistency

Building trust is essential in achieving customer satisfaction. When you deliver a consistent customer journey and communicate consistently, you increase the level of trust that a customer has in your company. An emotional connection over the long-term also strengthens loyalty. According to one survey, 86% of customers said they would be willing to remain with the business if there was an emotional connection with a customer service agent.

Map out your customer journey to understand every customer touchpoint, the gaps between department interactions, and how you can make overall customer interactions seamless. For example, what information is sales sharing with customers at the purchase stage? How can your support reps follow through with this information for the customer?

Then optimize an integrated CRM to ensure that customer service staff members have everything they need to successfully support the customer journey.



How does a CRM tool make a consistent customer experience possible?

Silos — teams working separately but within the same company — are becoming a death sentence for the customer experience.

Typically, departments are pushed in opposite directions when trying to meet their goals, causing them to keep information from other departments or sometimes even compete against one another. For example, sales teams are incentivized to have conversations, while support teams are incentivized to end conversations. They operate as silos or separate entities.

40% of company respondents cited having their own departmental agendas, but only 29% said it was a collaborative process.

In addition, there are now multiple channels for customers to access your business such as through Twitter, live chat, email, and more. When these channels and departments aren't connected, the customer experience suffers.

Picture this scenario:

A sales rep has a prospect who finally signs the dotted line. To close the deal, the sales rep offered a package that matched the prospect's budget. The marketing department then emails an eBook to the new customer to get them onboarded with the product/service. However, the resource's focus is on a particular service feature that the sales rep didn't even mention to the customer. The customer calls support for assistance, but becomes frustrated when she has to explain both the package and resource. Turns out, the support rep wasn't informed by marketing and sales about either!

A fantastic, seamless customer experience?
Not so much.

Since the ultimate goal of every department is to acquire and retain customers, support, marketing, and sales teams should be pushed to share information with each other and work together to achieve that common goal. "The days of thinking about customers as living in separate sales and support clouds are over," says Zendesk founder and CEO Mikkel Svane, "Customer experience transcends any single function or team."

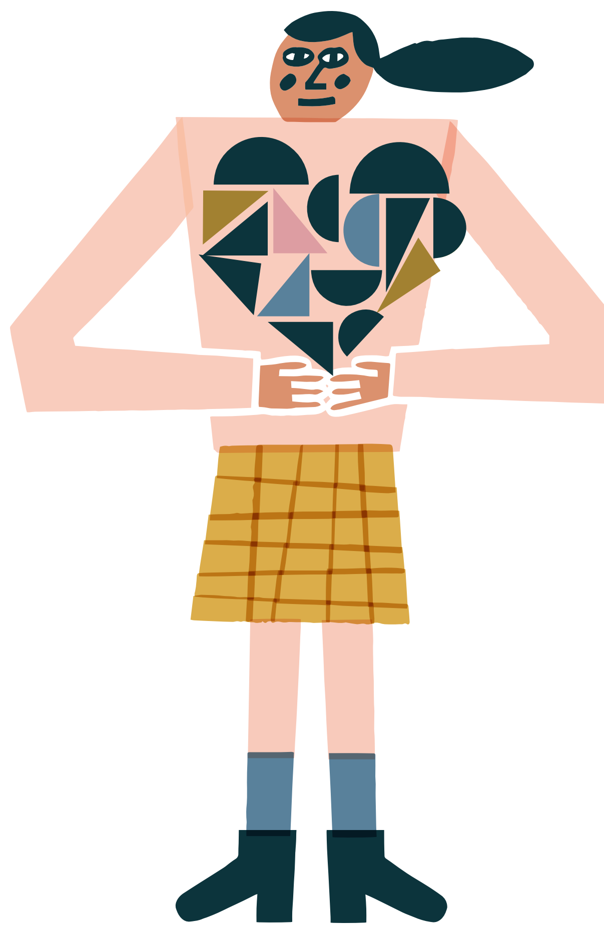
By using a single CRM platform that aligns support with sales and marketing, you meet the customers' expectations that company interactions should be consistent — from purchase to support issues.

- Connect valuable customer conversations across departments.
- Ensure that no customer problem/concern falls through the cracks.
- Track the entire customer experience from pre-sale to post-sale.
- Increase productivity through automation so support reps can focus on providing excellent customer service.

Run through the above scenario, but this time with a CRM:

The sales rep closes the deal, offering the same service package to meet the prospect's budget. However, this time, the information is recorded in the CRM and visible to both support and marketing. Marketing sends a resource, but one with information that matches what sales are explaining to customers. When the customer calls support, the support rep checks the customer's record in the CRM to review customer conversations and info.

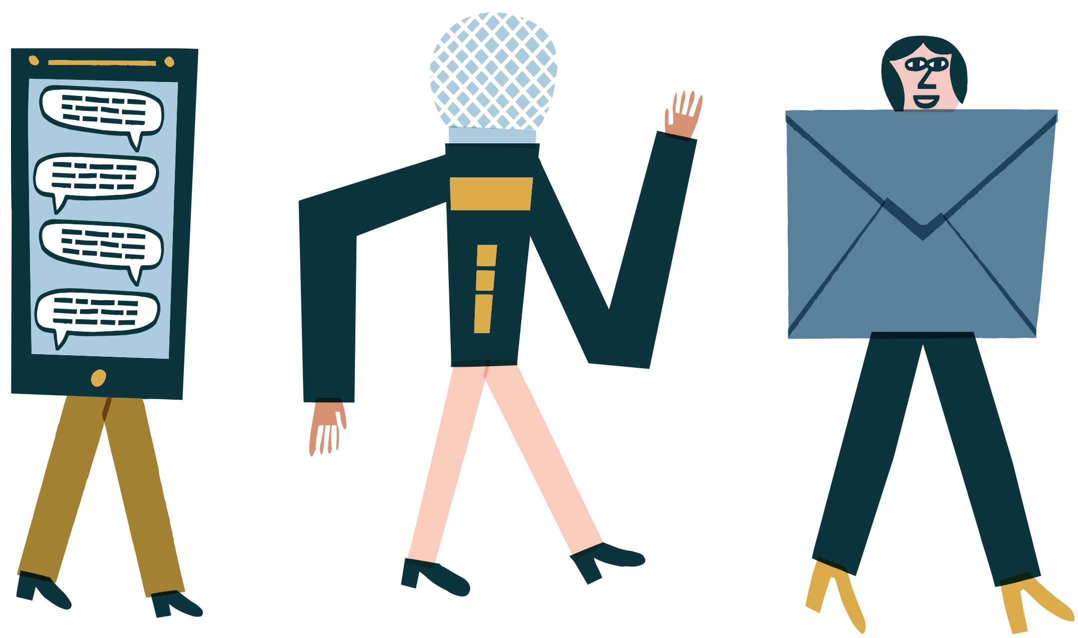
The result is a seamless experience that makes the customer feel heard and valued.



How to create an end-to-end customer experience with your CRM

No matter where customer interactions are coming from (social media, live chat, phone, email, etc.), your CRM should be able to create support tickets based off of each interaction so you can solve customer problems faster and more efficiently. This results in consistency based on individual customer service interactions with customers.

But to improve the overall customer experience and make the most of your CRM's capabilities, optimize it to work with other departments. Share support tickets with sales, create relevant customer resources with marketing, and access customer data insights.



Share support tickets with your sales team.

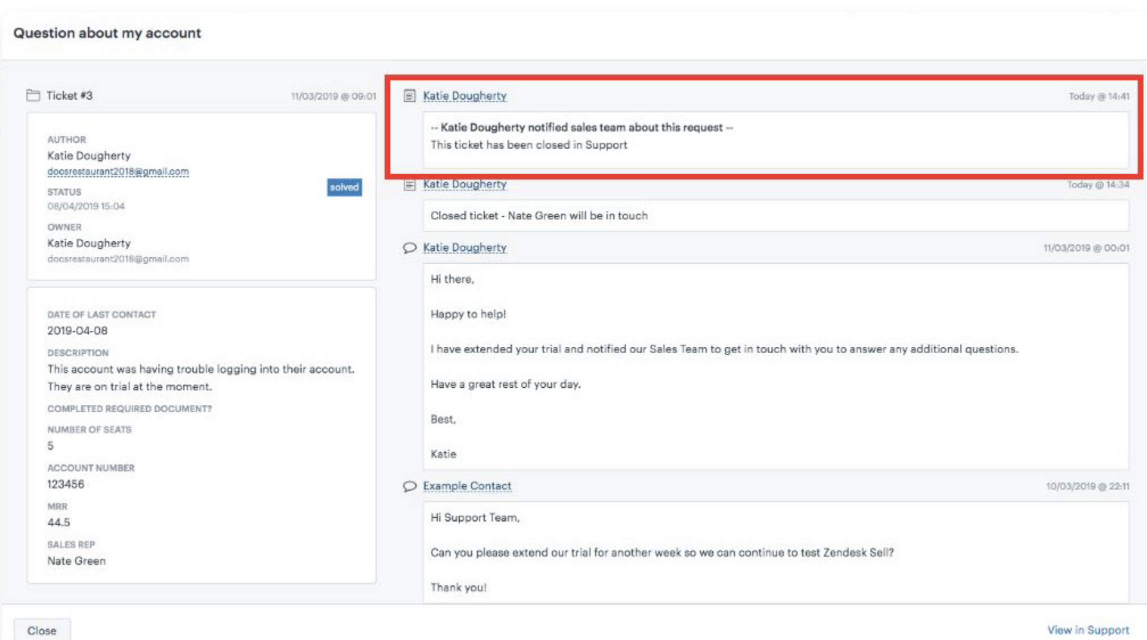
“Thank you for answering my question,” a customer responds to a support rep email, “I’d also really like to discuss adding on the Premier Plan to my account.” Support sometimes doesn’t forward issues like these that require sales assistance. Often, it’s a matter of the support rep not knowing which sales member to send it to, resulting in a lost sales opportunity and a customer being disgruntled that they weren’t contacted again.

It’s also a missed opportunity to demonstrate to the customer that your company recognizes their needs and offer them personalized service.

According to [The Forrester Tech Tide: Sales And Customer Service Technologies, Q3 2018](), “Customers expect interactions personalized to who they are, what they have done, and what they are currently doing. To meet these expectations, sales and service personnel must have a full view of the customer: their interaction and transaction history; their current account status, and even their current context and journey. They must have technology to guide them to the next-best action or conversation — or the task with the best outcome.”

With [Zendesk Duet](), a combination of Sell and Zendesk Support, support can easily forward specific tickets to sales. Sales reps can then answer questions, identify upsell opportunities, find resources to send, etc. [Sales teams provide crucial context]() into who their customers are and what they want, and support has critical insights into how expectations are being met. It’s a team effort to ensure that the customer’s needs are being met.

And, should a sales rep want to deliver a more informed pitch and turn a conversation into a conversion, they can look into a ticket to understand prior support interactions.



Support ticket notification to a sales team

View sales conversations to align messaging.

Seventy-two percent of consumers think that having to repeat themselves — first to sales, then to support, etc. — is a sign of poor customer service. Communication gaps are eliminated between sales and support when records of customer interactions are accessible in the CRM.

A CRM gives support teams access to answers of the following questions:

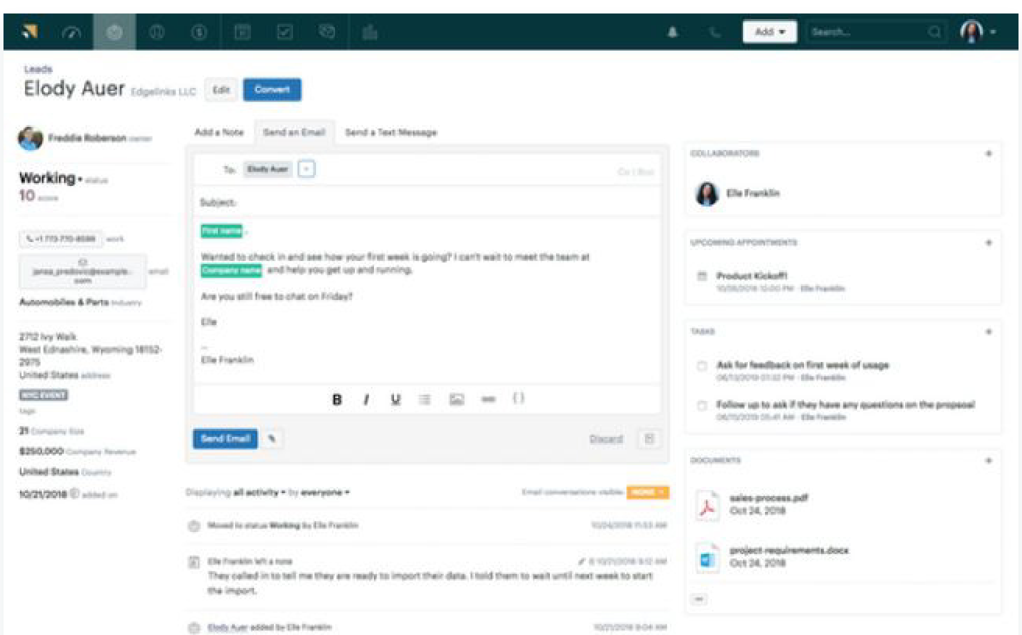
- What are common objections/concerns prospects have/had during the marketing and sales process?
- What are sales reps telling customers about the product/service?
- What language is sales using to describe your product/service? Does it align with what support reps are sharing with customers?

This information can then be used to provide better, more personalized service when customers contact support.

For example, with Zendesk Duet, support reps can access customer conversations at any time to refer to during customer interactions. Support can simply go to the contact's record and scroll through activities and conversations (which are also timestamped) to review the customer's history.

Let's say that one of your support reps is contacted by a new customer. "Sales told me that I could use X feature, but it's not working," she says and explains the issue. Instead of asking the customer who their sales point of contact is, your support rep jumps into the CRM and pulls up the record with the full email conversation between the sales rep and customer.

"I see you've been working with Ellie Franklin and you do indeed have access to X feature," your support rep says. "It sounds like you may have missed one step with set-up, though. Let me help you get that straightened out." It's a simple, seamless interaction that assures the customer that both sales and support understand her needs and care about her success.



Integrate with marketing automation software.

Customer service reps are often missing the right resources when talking with customers. Whether interacting with customers over phone, live chat, or email, it's difficult to provide an amazing experience if marketing materials don't match common customer problems.

For example, maybe a customer asks a question about your product's bookkeeping feature. Marketing — thinking that customers have questions about other product abilities — has provided your support team with case studies, FAQ pages, and guides, but nothing that will help the customer succeed with that particular feature.

While your support rep can answer the immediate question, the customer will likely have similar questions about the feature in the future — questions that could easily be answered with the right material.

With CRM marketing integrations, marketing can see what customers are asking support reps so they can develop related resources: explainer videos, blog posts, case studies, etc. Support reps can then share these resources during customer conversations and even afterwards, as an excuse to follow up, to show the customer that their needs are top of mind.

A helpful tip? Even with the right content, opportunities to connect with a customer can be missed because support reps can't find the resources they need. Ensure that the right customer support material is easily accessible. Consider creating an online resource library (e.g., with Google Sheets or Airtable) where both the support team and the marketing team can access and add new customer material.

Use shared customer insights to improve customer service.

According to a Zendesk survey, 86 percent of small and mid-sized businesses rank the sharing of customer data between sales and support as "very important" when evaluating software to purchase. And with good reason. The resulting customer insights allow you to analyze your customer segments and create personalized recommendations.

For customers, personalized options are part of having a consistent experience — and one they're willing to share their data to receive. One survey found that 57% of consumers will share personal data in exchange for personalized offers or discounts.

Make the most of the shared customer data in your CRM to create personalized product/service offerings. It should already be optimized for collecting customer data, but your CRM should also enable the following:

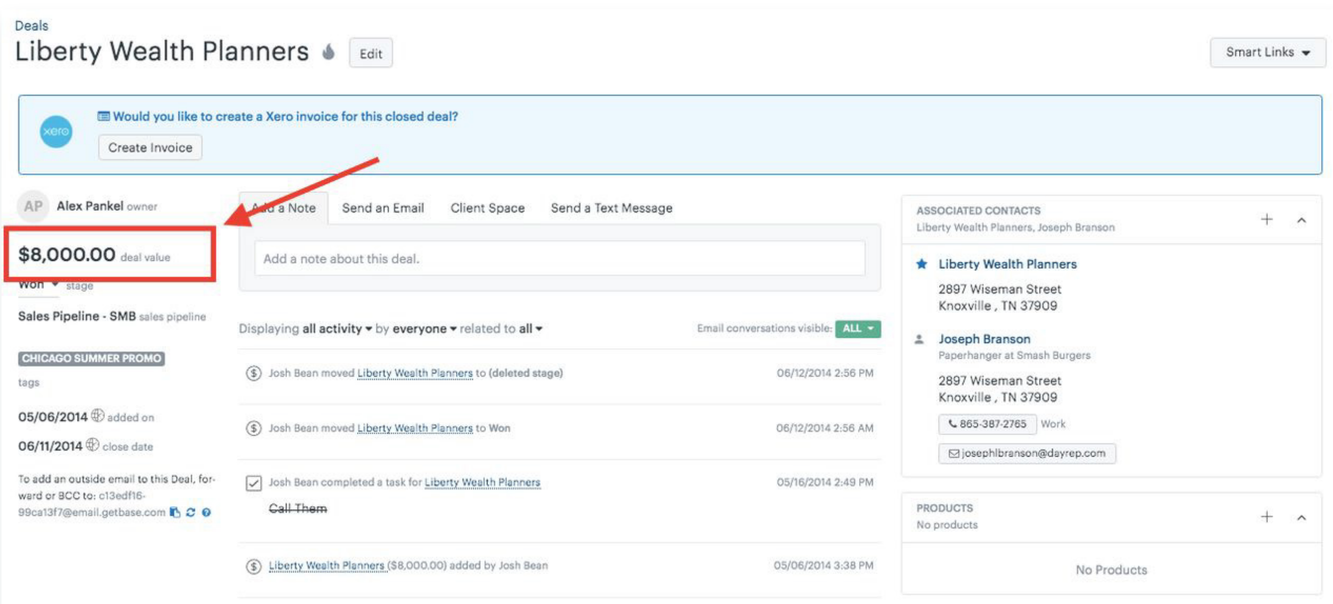
- Access customer records to view which customers are most profitable and should be prioritized.
- Use things like purchasing behavior, account status, etc. to provide personalized solutions to customer problems.
- Automate data-sharing so it's available instantly across departments (no manual data-entry required).

For example, when you have access to customer records, you can review data such as the amount of revenue customers generate. Ensure that every department (specifically sales and support) can check which customers are generating the most income within your CRM (on average, 80% of a company's revenue is generated by 20% of their customers). This information should be available in each contact's record.

Use this information to segment top customers and create a plan with sales to provide personalized experiences such as exclusive resources and one-on-one consulting. And this is only one strategy for creating a consistent experience for a particular customer segment. Review the data you have in your CRM and determine how you can use it to personalize experiences for other customer segments.

With Zendesk Sell, you can customize many of your data-entry fields to get an accurate snapshot of the information you need most to create personalized customer offerings. It's a tool that's centered around responsible, shared data ownership, but also has other benefits, such as organizing data, automating everyday tasks, and gaining additional insights from data through analytics.

You can also review important metrics within reports such as Lifetime Value and Net Promoter Score; share with sales and see if your customer experience efforts are effective.



View the value of each customer within your CRM

Conclusion

According to Tony Hsieh, Founder and CEO of Zappos, "Customer service shouldn't just be a department, it should be the entire company." A consistent customer experience requires that every department work together to serve the customer, not just support. And these efforts are necessary. When your customers receive an inconsistent experience across multiple departments, it can damage how they perceive your company, which can also affect customer retention.

Optimize your CRM to provide a seamless end-to-end experience and top-quality customer service, no matter the time frame or department customers are interacting with.

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