

Why CRM solutions cannot drive improvements in customer experience

Synopsis

Customer Relationship Management (CRM) solutions are now prevalent in most organisations to manage customer relationships and interactions. They are critical tools to driving leads, managing pipeline, service and market to your clients.

Many CRM solutions also offer email marketing tools as a way to market to potential customers or upsell existing customers. Some CRM vendors are beginning to offer such email marketing tools as a solution for Customer Experience Management – these tools can send out surveys to clients, gather feedback and are already integrated with existing CRM – so why not use this rather than procure a separate solution?

Because it won't deliver the benefits you are looking for in a Customer Experience programme i.e. deliver real improvement to your customers. This whitepaper outlines why CRMs are square pegs, when it comes to the round hole of customer experience management.



Why you need a CEM tool to improve customer experience

Organisations invest in a Customer Experience Management (CEM) programme because they want to meet or exceed customer expectations and, thus, increase customer satisfaction, loyalty and advocacy. They require clear processes and purpose designed technologies in order to achieve these goals.

A successful Customer Experience Management (CEM) programme, incorporates a number of key aspects including; understanding your customer journey, identifying the key drivers for an excellent customer experience, asking your customers for feedback, analysing the results, and finding areas to improve so you can take appropriate action over time.

Only a specialist CEM system will manage all these factors in a comprehensive, efficient and cost effective way.

While many organisations have a CRM tool in place, **CRM and CEM are not the same**; they have separate operational goals and come with functionalities unique in their own way.

While a CEM is designed to protect and maximise the valuable relationships you have with your customers at every stage of their journey, CRM is designed to be an email marketing tool, focused on collecting and organising data and serving it up to sales teams in a way that helps them leverage and gain sales leads. CEM consistently enables rich customer relationships, whereas CRM is invaluable in providing up-to-the minute data.

A purpose designed CEM system is vital in terms of providing insight into the right things (the things that most impact a customer's experience), and the ability to turn these insights into actionable results. Most CEM tools offer deep integration with market leading CRM tools to eliminate double entry and ensure seamless integration between the two systems. For the best results a CEM and CRM that work together to provide the best customer data with the best actionable feedback, is required.

Here's the functionality you'll need from a well-designed CEM system working in tandem with a CRM:



1. Customisation for a great survey experience

An optimised survey experience is crucial to getting useful and actionable results from your customers. A purpose built CEM that utilises both individual survey answers and client information from a CRM, allows you to be intelligent about how you engage customers, only asking relevant questions that are pertinent to them.

Similarly, functionality that allows you to tailor email invitations and surveys to have multiple 'looks' or to be signed off by different staff members, depending on the service the client has received gives clients the feeling they're interacting with their trusted representative.

2. Tailored reporting for crucial insight

It's vital to easily decipher results and pull out the insight needed by different staff to take the right action. To this end reporting designed to suit each staff members needs and tailored to your survey, will prove highly valuable.

Look for a tool with easy to read dashboards that are configured to highlight good customer experiences and show the weakest areas – what needs to be worked on the most – in the customer journey, without needing to employ further analysis.

Enable different staff members to see a tailored view of the results, while senior managers see the whole organisations results, but a team leader or divisional head may only want or need to see results pertinent to their team.

Client stories are far more compelling as a stimulus for change than ratings and statistics. Displays such as client stories and word clouds, ratings, types of service provided or any other combination of customer information from your CRM provides easy contextual understanding.

Tools that have work processes in place for dealing with actionable comments from clients lead to real results. An Action Register tool for example, allows staff to manage an issue through to resolution or assign to others for follow up.





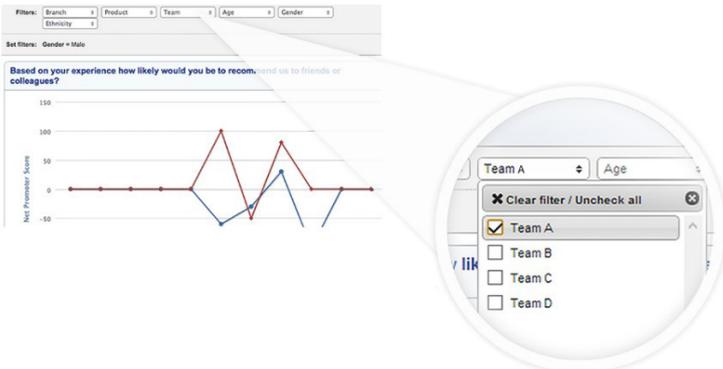
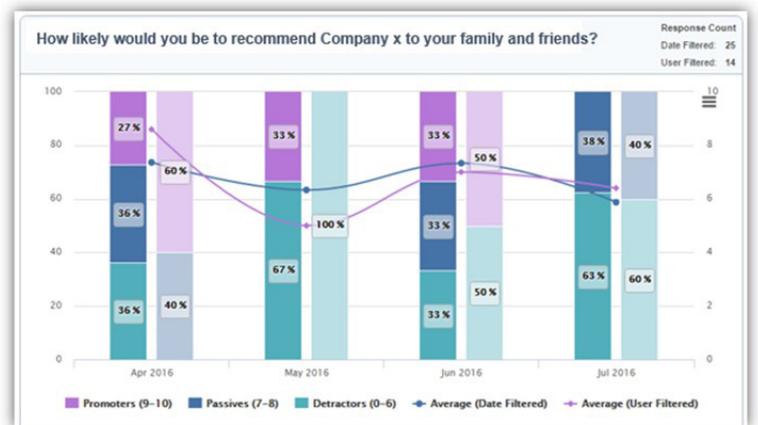
3. Confidential responses

There is a wealth of evidence that customers are more likely to provide honest feedback if they know their name won't be attributed to their feedback. While some CEM systems claim they can incorporate a customer survey component, the feedback is directly attributable to the specific customer, which can be very off putting. CEM systems keep the two sets of data separate, meaning you get better quality, honest feedback.

4. Understand trends over time

A successful CEM programme will provide and update results continuously and track trends and results over an established period of time.

Trend reporting is critical in identifying how experiences are changing over time and enable comparisons between different business units or client types.



5. Smart filters

Sophisticated filtering allows information you have about your customers to be used as a filter in the reporting. This enables instant comparisons by business units and staff, or to drill down into specific customer types and further identify trends in customer experience.

6. Know when action's required

Choose a CEM that goes beyond email alerts, and utilises survey answers or customer information to route action items to the staff members who are ultimately responsible for that client's interaction, to see and act on that feedback.

The Action Register is designed to allow easy management of actions through to resolution.

Line managers can get a real time view of how responsive staff are to actions or how long it is taking to resolve items.

Knowing what action is required is key to continuous improvement.

Date	Name	Contact Number	Email	Message	Assigned To	Resolved	Notes	Full Response
3 Jun 2015	Jan Burns	027 262 7420	janb@twin-oaks.com	Great weekend service	John Carter	<input type="checkbox"/>	2 Notes	
8 Mar 2015	Melanie Cook	01 354 8800	mcook@twin-oaks.com	A very nice visit	John Carter	<input checked="" type="checkbox"/>	0 Notes	
7 Mar 2015	Greg Jones	08 184 3714	ggjones@twin-oaks.com	Ok visit	John Carter	<input type="checkbox"/>	5 Notes	
7 Mar 2015	Jarvis Potts	021 688 328	jp@twin-oaks.com	No reply to visit	John Carter	<input type="checkbox"/>	1 Note	
7 Apr 2015	Susan Kirk	07 844 8074	skirk@twin-oaks.com	Her to attend rehab waiting	John Carter	<input type="checkbox"/>	4 Notes	
6 Apr 2015	Melanie May	01 562 8800	melmay@twin-oaks.com	Had time to talk	John Carter	<input type="checkbox"/>	0 Notes	
3 Apr 2015	Greg Jones	08 184 3714	ggjones@twin-oaks.com	New Patient	John Carter	<input type="checkbox"/>	1 Note	
22 Feb 2015	Wendy Tapp	022 670 9074	wendy@twin-oaks.com	New staff	John Carter	<input checked="" type="checkbox"/>	0 Notes	
19 Feb 2015	Sarah Black	016 634 9634	sblack@twin-oaks.com		John Carter	<input type="checkbox"/>	0 Notes	
11 Feb 2015	War Jones	08 825 3880	wjones@twin-oaks.com	Call with feedback	John Carter	<input checked="" type="checkbox"/>	0 Notes	
23 Jan 2015	Greg Jones	022 856 3214	ggjones@twin-oaks.com		John Carter	<input type="checkbox"/>	1 Note	
21 Jan 2015	Jarvis Potts	022 670 9074	jp@twin-oaks.com		John Carter	<input type="checkbox"/>	0 Notes	

7. Tailored user views

Across some organisations it is important to be able to configure specific views of customer feedback, tailoring the ability to view the reporting to different levels within the organisation, or opening up all customer feedback to the organisation for complete transparency.

9. Ensuring customer insight reaches people, regardless of their CRM access

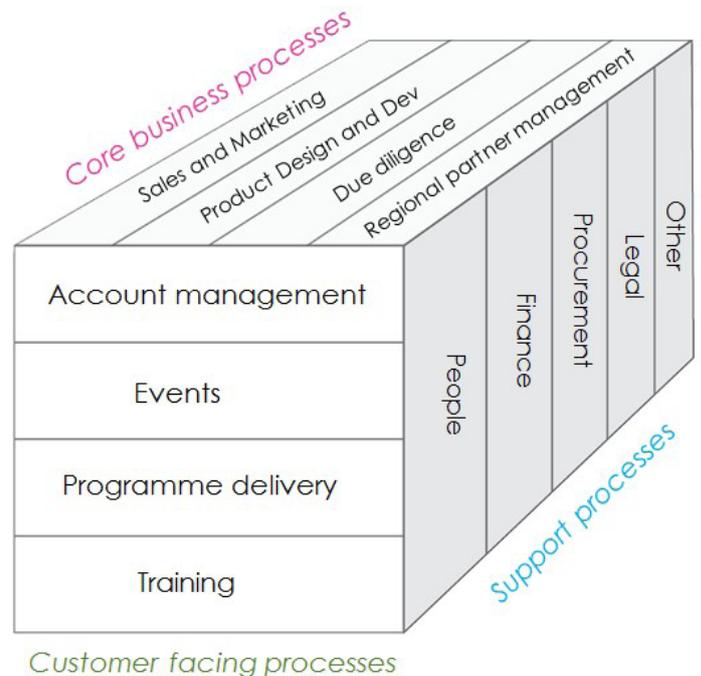
A true customer experience programme considers all elements of a business, often going beyond Sales and Marketing to other parts of the business, many of which will have no access or interest in the CRM business. By decoupling the CEM and CRM tools, these other areas can access the CEM analytics without needing specific CRM access or know how.

Conclusion

Understanding and improving customer experience is much more than simply surveying your customers. Initially, it's about building a strong understanding of your customer journey and the true drivers to a good customer experience. It's then capturing feedback from customers at the right time, with the right questions in a format that ensures they feel comfortable in providing genuine and deep insight that you can act on. Finally, you need to disseminate that information to those in the organisation who have the power and responsibility to enact change. It is these core elements that means the CRM email marketing tool is the square peg, to your customer experience round hole.

8. Simple but sophisticated - no training required

Ensure a system that's easy to use and get the results you need. Set it up so that anyone within the organisation who has a client-facing role can be given access, seeing their tailored view and able to act on the feedback that's most relevant to them.



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