

The background features a dark, almost black, field with intricate, wavy, green lines that create a sense of depth and movement. On the right side, there is a faint, glowing green silhouette of a smartphone, showing its screen and camera area. The overall aesthetic is modern and digital.

What is Customer Experience and why does it matter?

— The ultimate guide to CX for marketers.

StrategiQ



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Why CX matters

Customer experience is everything. The digital-first world offers huge opportunities, but to truly transform your customer experience, you need strategic thinking, a limitless approach and strong partnerships.

Give customers what they're looking for, when they're looking for it, and they'll buy. Then buy some more. Then tell their family and friends, and return time after time because it's just so easy. We all work towards this every day but, for most businesses, creating an Amazon-like experience feels out of reach.

It doesn't have to feel that way. In this guide, we share the knowledge, processes and technology that enable businesses of all sizes to create meaningful, value-adding customer experiences.

Moreover, you don't have to do it alone. The right partners are critical, enabling even modest marketing teams to achieve best-in-class customer experiences compared to their competition.

Insight

According to Forbes, 96% of customers would walk away if you delivered a bad customer experience.

Pushing the boundaries

The pandemic proved that we could still feel connected to the outside world without setting foot outside the door. From our socially distanced settings, we purchased online like never before, setting a high bar for the businesses that survived.

Now, customers expect to feel highly connected to brands before they part with their hard earned pennies. This goes for a whole new generation of shoppers; not just the Gen Z natives. The landscape is dispersed and highly competitive. **According to Forbes, 96% of customers would walk away after a single bad customer experience.**

For marketers, one thing's for sure: we can't look to the past, but should instead turn our focus towards today's norm and embrace our new understanding of consumers.



Digital transformation

Digital transformation is not new. Businesses have been digitally transforming for years. Pre-pandemic, we routinely enjoyed online banking, hotel booking and shopping. But online yoga? Not so much.

What's different now?

It's no longer enough to transform paper processes - it's about making people feel part of brands, long before they buy. To do that, a smooth, connected customer experience is essential. Sales are still critical. But we now need to recognise the value of a highly engaged funnel so that it's your business that comes to mind when customers have a need.

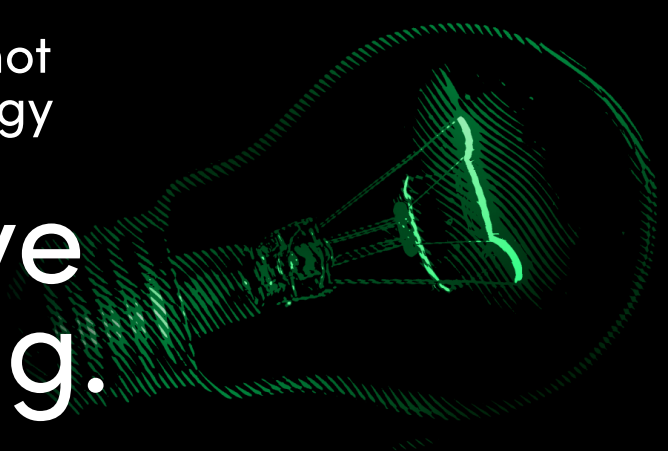
The bottom line is, if a piece of the journey isn't working in a customer's favour, or the tech behind your business is disconnected, you'll risk delivering a below average customer experience and they'll go elsewhere.

What does it mean to you?

As a marketer, the pressure is on to deliver a frictionless customer experience (CX). Most of us have already begun the journey - **In fact, a recent survey confirmed that as many as 99% of marketers changed their digital CX strategy in the months following the pandemic.** The challenge is in understanding how to leverage the CX opportunity and apply it to your business. You see your competitors offering seamless services - and can relate and aspire to those expectations - but how are you going to get there while delivering a return on investment?

Ultimately, it's not just about technology - it's about creative thinking. While technology works hand-in-hand with the execution of the customer journey, it's also just as important to focus on the quality of the thinking behind it. In this paper, we'll demonstrate how a business of any size can deliver a CX akin to any Silicon-Valley startup.

Ultimately, it's not
about technology
- it's about
**creative
thinking.**





Defining CX

What do we mean when we say customer experience?

Customer experience (CX) is the sum of all the interactions your customers have with your business. It's also the way customers think and feel each time they interact with your brand.

A positive experience is the key goal for any organisation that wants to gain, and keep, customers. And, as you know from your own experience as a consumer, it's a total win-win if you get it right.

When it works, finding the right product or service is easy – and you only receive content relevant to where you're at in your journey and what you're looking for.

When it doesn't work, the overall experience can be anything from clunky at best to frustrating and broken in the worst cases. Slow-loading web pages, a lack of payment options, the need to re-key information, being bombarded with emails. Pick any or all of the above.

When someone thinks about buying something, they are (consciously or not), evaluating the experience they are getting from you. They're checking a couple of things – the 'utility' value and also the emotional value that they and others associate with your brand:

Utility value

- ◆ Price
- ◆ Product
- ◆ Availability
- ◆ Ease of use

Emotional value

- ◆ What do others think?
- ◆ How does this brand care for its customers?
- ◆ How does this brand make me feel?

An incredible customer experience is critical to company growth.

It's proven to increase loyalty, retention and long term customer value. It's not a vague ideal, but something tangible.



How do we measure customer experience?

You can measure it in a variety of ways: **Customer Experience Metrics** further down this paper covers this in detail, but things like Net Promoter Score (NPS) and sentiment scores will give you some insight.

You'll hear the term 'touchpoints' often. In the good old days, a typical first point of contact with a business was a phone call, an event or a visit to the premises – particularly in the B2B space. However, in recent times, many more touchpoints are now digital, and usually take precedence over face-to-face. That first touchpoint is far more likely to be a social media campaign or influencer post than a coffee at the club.

That's not to say the face-to-face experience isn't important – of course it is. And, thankfully, these truly personal touchpoints are coming back. But digital is king. What does it mean for sales when you can't always get in front of a customer?

Customer expectations and its role in the business

To ensure that your buyer (or prospect) becomes your customer, it is your responsibility as an integrated business to guide the way. If any touchpoint is below par, then you risk that buyer dropping off the path.

A valuable customer journey turns the spotlight on every form of communication; from that first blog post to your product description, chat function, confirmation emails and the way you respond to review.

For all businesses, of all sizes – we're all in this together

Regardless of size, companies need to understand things from the eyes of the customer. **CX vs. CS** unearths the tactical considerations for establishing the customer experience, while **The Buyer Journey** gives you more detail on how to review your systems and processes to make it happen.

What makes creating customer experiences exciting is that we all 'get' it. The shorthand 'CX' is an umbrella for the wealth of checks and emotions we all go through every time we engage with a brand. It's as relevant to a pre-teen making their first Xbox purchase as it is to a Financial Director looking to acquire their tenth software system. It covers B2B and B2C. It impacts businesses, organisations and the third sector alike.

But before we look at the customer journey in detail, we need to understand the difference between two key phrases. They are often used interchangeably, but are in fact quite distinct: customer experience and customer service.



CX vs. CS

The difference between customer experience and customer service

Customer experience and customer service are linked, but they are not the same thing. Customer experience is the entire web of interactions (or touchpoints) that a customer has with your company, whereas customer service is usually focused on helping a customer at a specific point in their journey.

Learning the difference between the two can massively enhance the value of prospects and customers over time.

Customer experience covers the path someone takes to a purchase (as a 'prospect') as well as when they become your 'customer' and can be nurtured. As we mentioned earlier, it's the sum of all their interactions with you. Take your car insurance, for example. The experience covers everything from how easy it was to find a competitive quote and set up the policy to what it's like to renew a year later.

Customer service: often comes about as a direct response to a query or question. It can involve contact with a human, or a digitally assisted 'agent' such as a Chat facility. Often (but not always), the interaction comes about due to a negative experience – perhaps receiving the wrong product or damaged goods, not receiving the product at all or not finding enough information online. In our example above, it could be the moment you phone up a call centre to put in a claim for a road accident.

Ultimately, if your customer service is aligned with your customer experience, then you will attract and retain customers. This link in your web or chain needs to be robust, adaptable and digitally assisted.

As we know, we're more likely to post a negative review about what we perceive as bad customer service than to rave enthusiastically about a great customer experience. In the case of the latter, we are too busy enjoying the results of our perfect product or service to take time to review. Our chapter: **Reviews and CX** covers some innovations to help you improve your online reviews. For now, let's take a dive into tools that can help you ensure great customer service.



Customer service

The role of customer service in customer experience

Customer experience is the complete journey people go through when they connect with your brand: from discovery through to purchase and post-purchase. Customer service is ‘in the moment’ – a direct response to a question or an issue – but plays a key role in influencing the experience your customers have overall.

When most of us think of customer service, we think of the long-maligned call centre – a place few of us wish to go, but where we are generally forced when something goes wrong.

However, the profile of customer service has seen a significant upturn as businesses recognise the role good customer service plays in strengthening the overall buyer experience.

Basically, companies need to make sure they are ready and waiting the moment a person wants to reach out to the brand – and this applies to the very start of the buyer’s journey as well as post-purchase.

For example, customer service plays a role in:

- ◆ Helping a customer choose the right product
- ◆ Troubleshooting any issues once the product has been bought, for example providing Help guides or videos on assembly
- ◆ Advising customers on complementary or alternative products and services

Customer service – not just for ecommerce

Technology is essential in order to drive better customer service in ecommerce firms, but can be used just as effectively in any organisation that regularly needs to answer questions. For example, student queries in the education sector, technology companies offering software as a service, logistics, professional services... the list goes on.

As always, it’s about giving your customers the tools to communicate and interact with your brand in the way they like and want to. A creative approach helps: a traditional law firm or conveyancer might not turn to SMS as their first way to respond to a customer, but a ‘try and test’ approach could reveal a distinct competitive advantage – as well as appealing to the next generation of clients.




What are the challenges of providing customer service at scale?

Managing a shared inbox for customer service enquiries might work for startups, but it's not an option for companies that are scaling fast. The challenge for businesses is:

- ◆ How do we make it easier for customers to reach out to us?
- ◆ What channels should we use?
- ◆ Who should be involved in answering customer questions?
- ◆ How do we keep track of all these interactions so that customers have a consistently good experience?

When mapping your buyer and customer journeys, work out which touchpoints could include customer service elements. When are people most likely to ask questions? How can you respond to these? Help can be delivered in lots of different ways: from a simple FAQ page on your website to a fully fledged help desk.



Customer
experience is
the complete
journey people
go through
when they
connect with
your brand



How technology helps turn customer service into revenue

A dedicated customer service software solution adds to your bottom line by bringing speed and quality to every touchpoint. This in turn convinces prospects to become buyers, and buyers to become loyal customers.

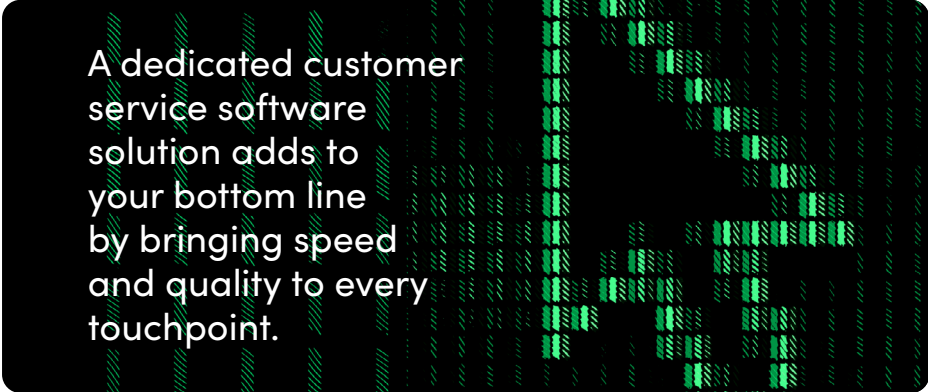
Here are just some examples of the tools you can use:

- ◆ **Email** – the ability to answer every email from individual shoppers in a shared workspace (rather than separate email accounts) means your customer service agents can see every interaction with your company without having to trawl for information. As a result, customers spend less time going over the same problem and get faster responses to their queries.
- ◆ **Social media and SMS** – when putting customers at the centre, it's all about connecting on the channels they like to use. If they prefer to reach out to you via Facebook, Twitter, WhatsApp or text, then that's where you need to be. A help desk provider should make it easy for your customer service team to review and respond to conversations across social channels.
- ◆ **Live chat** – to make customer service a true revenue enabler, your responses need to be timely, accurate and above all, personal. A good help desk provider will be able to integrate with your ecommerce platform – whether that's Shopify, Magento, WooCommerce or any other – and allow your team to pull up all product and purchase information in one place. This means they can answer questions about stock, orders and refunds, and action them without leaving the platform.
- ◆ **Real chat** – today's technology means that customer service agents can take voice calls equipped with full customer and product history, then move the conversation to SMS or email if required. This agility empowers both the agent and customer to resolve things as quickly as possible.
- ◆ **Automation tools** – a modern help desk solution uses automation to streamline the management of large volumes of inbound enquiries. For example, the technology is able to detect whether a message relates to a cancellation, refund or stock issue, and to tag these accordingly. As a result, agents can tap in and review a caseload of similar enquiries and manage them far more efficiently.



The link between customer service and content

It's important to include the customer service touchpoints within your content plan, as well-produced content can play a huge role in helping turn disgruntled customers into happy buyers. For example, a customer might reach out to the helpdesk to complain they are unable to assemble a specific product. Thanks to the automation and sentiment tracking capabilities discussed above, you know this is a common product issue. In fact, you have a video showing the buyer exactly how to overcome that tricky piece of assembly!



A dedicated customer service software solution adds to your bottom line by bringing speed and quality to every touchpoint.

Measuring the impact of your customer service efforts

◆ Overall feeling about the brand

Modern helpdesks leverage the social listening tools used within social media platforms and bring them into the customer service conversation. This enables businesses to gauge how well their customers are feeling when they interact with your brand. And, if it needs attention, knowing how to allocate the resources to handle it.

◆ Reduction in resolution time

This is the main figure businesses use to assess the success of their customer service investments. It follows that a cut to the time waiting for resolution increases satisfaction and overall loyalty.

Recap: so far, we've talked about what CX is and why it's important. We recognise that a great customer experience – that is, the sum of our interactions with a company – has to be reinforced with equally thoughtful customer service. Now, we're ready to delve into the details of the customer experience itself.

This is split into two distinct parts: the buyer journey and the customer journey. Both parts need to be aligned but are ultimately different, and should not be used interchangeably. Read on to find out why...



The buyer journey

What is the buyer journey?

The buyer journey consists of the steps people take to end up with a product or service – aka the road to purchase. As marketers, we often term people on their buying journey as prospects.

Why is the buyer journey important?

- ◆ A smooth buying journey gives prospects the right content at the right time to help them move through the purchase cycle
- ◆ By having a process, you better anticipate their problems, become better equipped to solve them and are more likely to win the sale

How can you implement the buyer journey?

Regardless of the model you follow – and we will touch on some here – you need to break down the customer journey into three key stages:

- ◆ **Awareness** – I have a challenge and want to solve it
- ◆ **Consideration** – I am trying different solutions and comparing them
- ◆ **Decision** – I desire that solution, and I'm buying it!

Insight

In order to create the awareness, consideration, desire and, ultimately, the purchase in your buyers, you need to understand their journey.

Buyer journey mapping

Mapping your buyer journey is a simple idea, yet harder in practice. While the journey will almost certainly not end up being linear, starting with an A-B approach will get you off to a good start. There are templates you can download to create a visual version of your buyer journey. Your ultimate aim is to map everything out from the first interaction to the final touchpoint.



Buyer journey or customer journey?

You can map both, starting with the buyer journey and turning your focus to the customer journey once you have a solid bank of customers. The customer journey in the next chapter covers this phase in more detail.

Think about:

- ◆ **Awareness:** where do our customers engage with us?
- ◆ **Consideration:** who and what will influence their decision?
- ◆ **Decision:** where are they buying? What methods do they use?

The point for marketers is to understand what buyers/prospects are doing at each stage:

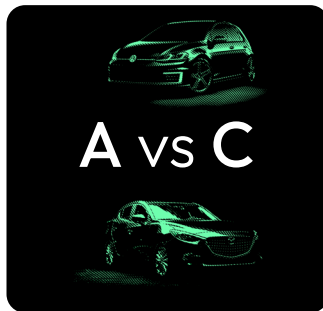
- ◆ What spurs buyers to the next stage?
- ◆ What are their motivations?
- ◆ What emotions are they feeling?
- ◆ What questions do they have?
- ◆ What's stopping them?

Let's take a simple example.

Cars A, B and C - **Awareness**



Car A vs C - **Consideration**



Car C - **Decision**



You know you want to buy a new car, but aren't sure what you're after. You type 'cheap reliable small cars' into Google and become aware of cars A, B and C. You then look up reviews about each car, and stumble on a car A vs C comparison video. Finally, you decide that car C best fits your needs.

That's a classic linear example, but as we're all aware, it doesn't always happen like that. As buyers, our actions may come across as fickle, causing marketers to scratch their heads as to why a seemingly hot lead went cold so quickly.

For example, you can easily find yourself in the final stages of the consideration phase, only to move straight back to the awareness part. Let's say that you put a final question to your network about whether they'd buy car A or C.



A friend suggests neither, and comes up with car D! In fact, they've just bought one, and love it so much that they refer you to their dealer. As a result, you're short-circuited back to the awareness stage but, with this word-of-mouth approval, the consideration part doesn't take long and within a week you're the proud owner of car D. Hooray!

But the big question is:



The buyer journey – getting it right

Here are our 6 tips to ensure a smooth buyer journey:

- 01 Integrate your systems**

so customer information flows naturally from one stage to the next. Don't ask them to re-key information or start afresh each time they talk to a different agent. The harsh fact is: your customer doesn't understand or care about your data silos. How many times have you been told "oh, my system's being slow today!" to cover up the fact that, actually, the poor agent is being forced to look up different systems and folders to find the information they need to answer your query?
- 02 Omni channel is the key**

offer the same experience across all channels, on- and off-line. It's no good having a seamless digital experience if your customer is greeted with an answerphone message when they try to actually have a conversation with you.
- 03 Don't rely on automation**

but use it to support the journey. Recognise when a face-to-face call is better than a chatbot.
- 04 Be a stickler for continuous improvement**

testing and optimisation covers how to use data insights to see what's turning buyers on (and off). Once you've mapped your buyer journey, it's just as important to monitor its impact and to make adjustments to keep your buyers on the right track.
- 05 Consider website visitor tracking**

a dedicated tool can help you identify details about your website visitors, such as the size of company, and the industry that it operates in. This provides you with an extra layer of data for hyper-targeted campaigns based around data on prospects that are already familiar with your company and in the market for what you offer.
- 06 Enable contact scoring**

Utilising contact scoring allows you to score your contacts based on their engagement, which can then help your internal teams to prioritise the leads you communicate with. For example, you may have a 'red hot' lead who has just requested a demo, who needs to be contacted by sales immediately, or you may have a 'cool lead' who hasn't been on the website recently and needs warming up via a lead nurture email series.



The customer journey

What is the customer journey?

The customer journey is the process of nurturing customers to keep their business. This process begins the moment your buyer goes from being a prospect to committing their cash or time. Nurturing customers to keep their value is important for any business. Not only is it cheaper to sell to existing customers than new ones, but returning customers are also more likely to spend more.

However, it makes sense to focus on optimising the buyer journey first, then turn to the customer journey once you have a decent bank of customers to nurture. The value of improving your customer journey can be measured with a solid set of KPIs.

Regular purchases, high value purchases and referrals can all be tracked to specific campaigns, while NPS can be measured through surveys.

How is it different from the buyer journey?

We all know that it costs up to five times more to acquire a new customer than retain an existing one. We also know that despite our best nurture efforts, customers do say goodbye.

Unlike the buyer journey, the primary purpose of the customer journey is not to educate the buyer, but to focus on strengthening their brand loyalty. It's important because customers have more choice than ever, and can afford to shop around.

So, what is the modern day equivalent of taking the client out to dinner? It'll depend on what you're selling and who to, but the crux of it is to always make your customers feel important. Customer experience-wise, you will revisit the same tools you used to woo your buyers, but with a distinctly different approach.

How to implement the customer journey

You'll want to map it out using the same format as for the buyer journey – by reviewing all the different touchpoints and considering:

- ◆ When are we required to get in touch with our customers, and how often does this need to happen? (For example, you may have a monthly billing system or annual planned preventive maintenance schedules.)
- ◆ What is the experience we want to convey at all these touchpoints?



- ◆ What value can we add at each stage? (For example, by informing customers about an upcoming change in regulation that you can help them prepare for.)
- ◆ How can you use content to make them laugh, learn and buy again?
- ◆ How can you leverage their business to further incentivise them to buy again, be a referral, or a brand ambassador? Can you invite them to beta launches of a new product, attend workshops, get first dibs on a product drop or take advantage of exclusive offers?

How do I measure the success of my customer journey efforts?

key metric to measure success is Customer Lifetime Value, or CLV. This calculation aims to understand how much income a client or customer will bring to the business during the period that they do business with each other. Traditionally, businesses have relied on historical data to work out their calculation. The most basic is Average Purchase Value:

Average purchase value x average number of purchases = customer value

The figure can help business owners understand the viability of their customers, as well as learning what customers like (and dislike) about their products and services.

The key thing to bear in mind when considering CLV is:

- ◆ There is more than one CLV formula - enabling you to measure other useful metrics such as frequency rate and average customer lifespan, as well as value;
- ◆ Predictive analytics are a useful enhancement to historical data, as they allow you to forecast customer behaviour and identify what buying patterns might be in the future.

In short, it is useful to set baseline CLV calculations prior to beginning your customer journey improvement initiatives.

A key metric to
measure success
is Customer
Lifetime Value





Buyer vs. Customer

The relationship between the buyer and customer journey

A thoughtfully mapped buyer and customer journey should be easy to understand and easy to adapt. You will need to leverage both journeys in your content, sales and marketing strategies, and you will use similar tools and platforms to manage both.

For example, your customer marketing platform will capture emails and automation paths for both buyers and customers. Your buyers and customers may return to the same website over and over for different reasons, but the positive customer experience should be consistent each time.

The journey doesn't stop abruptly once someone has purchased or signed up, but shifts into the nurture process, for example through a series of welcome emails.

There should also be scope for how an existing customer moves through the sales process when they have new needs or when they make repeat purchases. These needs might take years to materialise, or just a few days.

The journey
doesn't stop
abruptly...but
shifts into the
nurture process



Take a company that offers an online service where you can upload your photos and create printable photo books. You love the service, and within a few weeks, you've got the bug and created lots of books for families and friends. Happily, the company notices your activity, and sends you an email with a useful piece of advice about the extra cool features available in the Pro version of the service. It's a no brainer - you upgrade right away.

Thanks to a well-considered and connected customer experience, the process is very quick and easy, and you start to make use of the features right away. When you next visit the company website, you don't see lots of introductory information about How to Start Making a Photo Book - instead, the content is geared towards advanced features in the software.



Customers are unpredictable

This is yet another simple example of how buyers can become customers – and then buyers again. To be successful, marketers need to watch this activity and pre-empt the next move, which isn't easy when today's customers can appear fickle in their actions.

Your CX team

The importance of having a customer experience team

We have talked about the importance of having a customer experience strategy backed by the right technology. But what about the people? Who you need will depend on the size of your business.

In smaller firms, the business owner (often aided by marketing) typically drives and owns the project. In larger companies, the CX team may consist of 4-5 specialists, with 'CX' or 'CRM' incorporated into their marketing/operations/sales title to mark the extension of their job role. At enterprise level, you're more likely to find a Head of Customer Experience or Chief Experience Officer, with many different reports.

When it comes to CX, it makes sense to engage a multidisciplinary team, as it is a combined input across the business that is needed to bring it to life. Whether you give people formal titles or not is up to you, but certainly using these will add weight to your vision to be customer-centric.

What about marketing?

Marketing teams are going through a strange phase where they are called on both from a traditional perspective (more leads please) as well as to add value to the customer experience. CX/CRM teams now sit at board level and are actively informing each move a company makes as they have such a comprehensive understanding of the customer. In a sense, CX exists less as a branch of a marketing team and more as a separate department in its own right. This department's role is to underpin everything else and move the business forward.



Building your dream CX team

As we'll cover in the next chapter around tech, CX projects should not happen in isolated silos (so, no more 'handing it to marketing'), but be a joined-up effort. Marketers have a host of value to add as we will see below, but even they need help to set the vision, scope it out and implement the project – and that's where an external partner comes in.

Regardless of marketing's involvement, it makes sense to create a CX team with people who have skills in the following areas:

Key CX responsibilities:

_01 Leader	business owner, CMO, Director of Customer Experience: anyone with the gravitas to lead on the project – could also be externally appointed on a contract basis.
_02 CRM Manager	managing the day-to-day delivery of customer experience.
_03 Coordinator	supports the CX project leader, working across the different departments and teams.
_04 Data analysts	responsibilities include setting and measuring KPIs, identifying trends and capturing customer metrics, as well as connecting datasets together if necessary.
_05 Journey mapper	builds out the buyer and customer journeys into visual formats so they are clear for the group to view, understand and analyse.
_06 Design	capable of building out what's needed at the various touchpoints into prototypes; could be anything from a digital portal/hub to a Point of Sale unit.
_07 Communications	conveys the need for the project, explaining its importance both internally and externally.

Why marketing specialists are naturals at CX delivery

All of these roles could be carried out by a member of the marketing team. We are already adept at gathering customer data and using it to target our buyers. Our ability to guide the buyer around a website to complete a form helps inform the digital piece. We 'get' automation, having created and mapped thousands of digital user journeys and dynamic lists. Our content and comms skills are also a given.

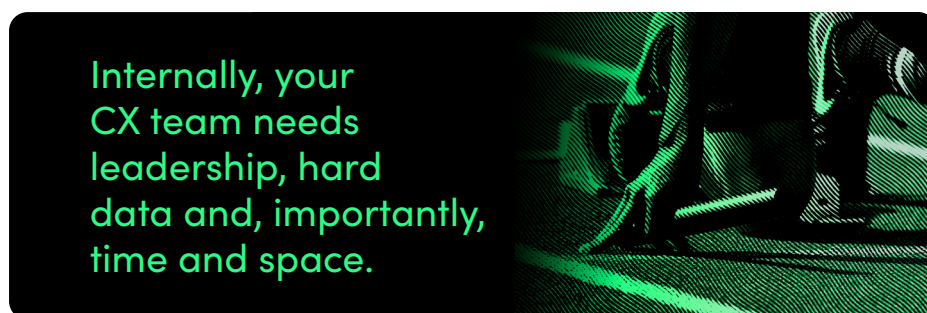


But marketing can't do it alone

Despite your natural skill set, it's critical to create a team that represents a rounded view of the customer. Ops, Sales, Finance, HR, Customer Service - all departments have different experiences with the customer and, despite what they say, no one team knows the customer best. When you build a dream CX team, you get the combined experiences to inform everything from product launches to events, soft releases and more.

Invest in time

Bringing in a partner adds an extra layer of knowledge gained from clear-sighted experiences of delivering best in class CX projects. Internally, your CX team needs leadership, hard data and, importantly, time and space. Giving people a proper break from daily schedules to invest in design thinking is essential if you as a business are going to come up with genuine ways to improve the customer experience.



Your tech partner

Why your tech partner is key to thinking customer first

Innovative companies have trained us to have a certain level of expectation when it comes to the CX experience – and smaller businesses are held to those same standards. As a CMO, you might find yourself involved in the fringes of a CX project, or conversely, asked to take the owner/MD's vision and make it happen – all on a slender budget. It's not surprising that CMOs are struggling to sleep at night.



Digital experiences enhance our lives. We know to check our phones for an email when we book a table at our favourite pizza restaurant. We relax knowing that we can track our children's spending, or our partner's route home on their bike. We expect our Amazon Prime orders to land the next day. We consume these beautifully simple experiences without much thought about the complexities the company has taken to get there.

Accessible tools for companies of all sizes

What's encouraging is that the tools, services and tech businesses needed to deliver these CX projects are available to companies of all sizes. Sure, you might not have tower blocks full of developers, but, as we will cover later in the next chapter, there's a lot of accessible tech out there.

More importantly, you don't want to start your CX journey without talking to a partner first. You only know what you know. Experienced agencies, with a huge network of contacts, can help bridge the gap between what you have and what you need to transform your customer experience.

Experienced agencies...can help bridge the gap between what you have and what you need to transform your customer experience.

StrategiQ x gorgias









When to engage an agency

Your website agency might not seem the most obvious place to start/resume your customer digital transformation journey. However, your website is where most digital journeys converge, so talking to whoever built it is a good place to start. From there, you can explore whether your website agency has the expertise and partnerships to solve your problem.

Setting your vision – examples of CX across industries

The first step is to have a vision of what you want your ideal customer experience to look like, rather than trying to fit your technology to the experience. Here are some real-life examples to get you thinking:

Client A		Is a luxury hotel offering gift experiences. Its vision is that customers will receive a text notification when their parcel has been shipped along with the tracking number. This client knows they need to link their ecommerce site with their fulfilment partner data, but isn't sure where to start.
Client B		Is a large charity which organises lots of fundraising events. Its vision is to automate the flow of information from its website. For example, when someone signs up for a fun run, their details automatically go into a CRM system for further profiling rather than a staff member having to manually enter the data into the ERP system. They're unsure whether they can use their existing ERP or need something else.
Client C		Offers heating solutions nationwide. Its vision is for customers to book engineers directly via the website, and for details of the booking to go straight into the engineer's calendar without any human intervention. The client recognises their current planning tool falls short but is wary of spending too much money on the project until they know it's achievable.
Client D		Offers an online review service where customers can compare and review salon services. Its vision is for software to automatically moderate customer reviews so they can be published swiftly rather than relying on an operator to look through them. The company is aware that AI can help, but needs guidance.

In all cases, the agency partner can advise on the practicalities and the solutions to achieve their desired end result.



Why call a partner?

- ◆ **Cost visibility** – a partner will make an early assessment of whether the work can be undertaken in-house, and/or when to bring in specialists, saving money upfront.
- ◆ **Vendor neutrality** – there is a danger that your existing tech partner may be tied in with certain partners, resulting in an ill-fitting off-the-shelf solution. Asking your website partner to advise is far more likely to result in a bespoke solution that accurately meets your CX vision.
- ◆ **A wider pool of knowledge** – a partner has hundreds of technical experts' experience at their fingertips, and can link these together to create an efficient collection of tools and processes.

Questions to ask your partner:

- ◆ What experience do you have of integrating ecommerce applications?
- ◆ Can you provide examples of digital transformation in my sector?
- ◆ What platforms do you work with?

Start small, scale fast

Smaller companies can compete with their larger competitors on many levels, not least their geography and personal customer service. But without a good digital experience, your customers may not even get that far.

Initially, improving your customer experience is less likely to be a single one-off investment that covers everything but rather the first of many smaller projects that underpin a wider CX effort. When selecting which CX project to start, consider:

- ◆ Where is the most manual work taking place?
- ◆ Where are your customers struggling or getting frustrated?
- ◆ What part of your business is likely to grow the most? Could you handle these processes if your business grew tenfold?
- ◆ What is your competition doing that's best in class? Automated bookings, live stock updates and personalised content are all examples.



CX tech

What technology do I need to deliver the best customer experience?

In the face of growing pressure to create good customer experiences, software providers have responded in their droves – evolving their off-the-shelf, single-function packages into incredibly sophisticated platforms that claim to do it all.

Here, we walk you through the new breed of customer experience-focused software packages – what they do, and the key features to look for.

Martech stack – the essentials

A customer marketing platform is just one element of your MarTech stack. Your ‘stack’ is simply the sum of the tech that you currently use to attract, engage and analyse your customers. Here is a quick run-down of the tools that should be in every company’s stack – and the good news is, they’re all affordable.

- ◆ **SMS/email tools** – Often overlooked but still so effective, email and text can be used singly or combined for extra power. The beauty of these tools is that people will have opted-in to use them, and so they should be interested in your message. These can be created, deployed and analysed as part of a customer marketing platform or managed in one (or more) separate applications.
- ◆ **Automation** – This covers everything from the sending of emails without human intervention to software that automates most of your business and customer-facing processes. During the pandemic, companies used automation to keep customers informed, even when their helpdesks weren’t available at the end of the phone. Automation stops customers having to wait around.
- ◆ **Social media** – Posts on social platforms and websites telling people about a product or service can be used to drive direct sales or simply encourage people to continue their customer journey with you. Social covers review sites as well as social networks, making it a powerful channel in terms of convincing people to move further along the path to purchase.
- ◆ **Website** – Your website is the natural hub for your customer experience journey, so having fast loading pages, smooth on-site navigation, readable, SEO friendly content and a simple, integrated payment gateway (if relevant) are critical to your success. Questions to ask your strategy partner include checking who owns the rights to the platform (if built on a proprietary framework), its integration with other systems and its readiness to accommodate ecommerce functionality – even if you aren’t ready for it quite yet.



- ◆ **CRM** – A Customer Relationship Management (CRM) software system is a generic term for a piece of software that holds all your prospect and customer data. In some businesses, the customer marketing platform is the CRM, whereas in others, the CRM is typically owned by the sales department and the marketing platform links to it.
- ◆ **Personalisation tools** – Anything that helps a business create personal ‘one-to-one’ experiences for buyers and customers counts as a personalisation tool. This could be the ability to show specific landing pages on your website, to sending out emails to groups of people that have expressed specific purchase preferences. Logging into an app and seeing your ‘recommendations’ is personalisation, as is simply adding someone’s name into the subject line of an email.
- ◆ **Analytics** – Data analytics will help you to understand your customers and tailor your marketing efforts (and budget) accordingly. You can see data about your website use, your email send/open rates, your customers’ sales value and so much more. The key is knowing what data you need to support the next steps in your business’s development.

Think customer first, channel second

Ultimately, when considering which tech you need for your CX project, it’s important to focus on the end goal. Your CX partner will help you define the outcomes and strategy, and then see if what you have already works or what new tech you need to explore.

Engagement platforms

Why having a customer engagement platform is key to success

What is a customer engagement platform?

Simply, it is a piece of software that allows you to track, manage and execute your interactions with your buyers and customers. The right system will enable you to understand the customer journey across the different touchpoints. Today’s customer engagement platforms have evolved from standalone task-focused packages to provide support for all of the following activities:



- ◆ Lead generation
- ◆ Personalisation
- ◆ Segmentation
- ◆ Marketing automation
- ◆ Omni channel marketing

What should a customer engagement platform do?

Regardless of the tech that you use, the platform should support those key stages of the buyer and customer journey, with the ability to:

- ◆ **Attract and engage** - streamlining collaboration to reduce manual work and duplication of data
- ◆ **Analyse** - performance of your marketing efforts, with accurate, real time information line of an email.
- ◆ **Optimise** - making it easy to send personalised communication to customers

How ESPs have grown into customer marketing platforms

Go back 20 years and Email Service Providers (ESP) were just that - a way for companies to send a large amount of emails from a dedicated business account.

Today, ESPs have moved with the times to keep up with the needs of the modern marketer who needs to do more with less. The advent of automation and low or no-code was a natural opportunity for ESP providers to make it possible for marketers to set up and run their own marketing campaigns. Today, we can do things in minutes that would've taken hours and a degree in coding to execute back in 2000.

Moreover, marketing as a discipline is no longer a one-way street. A combination of regulatory shifts and focus on customer experience means that people aren't happy to be marketed 'at' - they want to control their content. This covers things that they're happy to receive - setting their marketing email preferences - but also the content that they provide, for example, when writing a review.

To cap it off, customers are no longer predictable. Their intent is rarely clear. A newsletter sign-up is no longer a firm indicator of where they'll go next. This means that these modern ESPs need to keep on pushing the boundaries in order to deliver value.

Enter the customer engagement platform.



From customer marketing to customer engagement

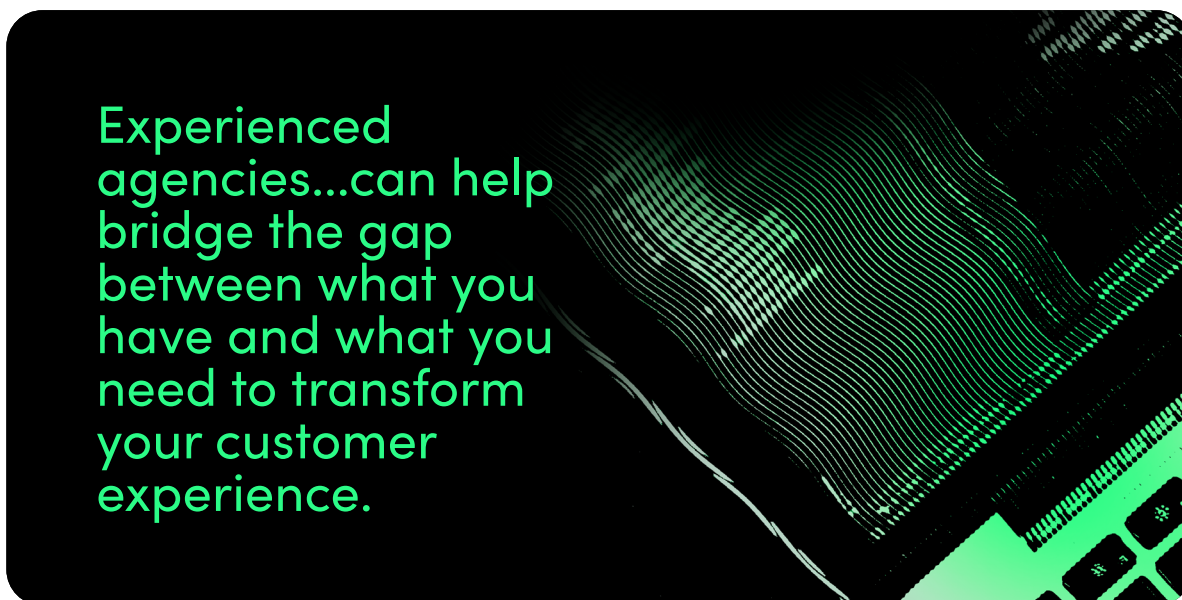
The key to unlocking customer loyalty is understanding the sentiment and intent behind their decisions. But to do this, you need data - masses of it - from as many sources as possible. The natural place for it all to converge is a customer engagement platform.

With so many market players, it can be difficult to figure out the right system for your needs. Choosing a solution with the following will enable you to embed your CX strategy into reality:

- ◆ **Integration** - a single company can contain hundreds of pieces of technology; some used by the entire business (CRM), and many of them located within the marketing team (e.g. a ticketing system). All of these may hold customer data in some form or another. In order to use the data to its full potential - not to mention reducing data duplication and errors - it's essential that your entire stack is able to exchange real-time information.
- ◆ **Data privacy, trust and audit** - keeping ahead of GDPR can be complex. A good customer engagement platform does a lot of the hard work with robust processes to collect data and consent in the proper way. It's also important to be able to demonstrate how that consent was collected, capturing things like the text the person responded to when ticking the box.
- ◆ **Fulfilling custom data collection requirements** - competitive advantage goes beyond simple automations, requiring creative data strategies. Naturally, there is no one size fits all template for these - so it is critical that the engagement platform is built from the ground up to enable brands to gather and use the data in a simple, cost-effective way.
- ◆ **Support** - functionality is important, but so is the help desk. Nothing sours customer journey efforts more than a lack of support when you run into a technical issue. Gone are the days of 9am - 5pm calling hours: today's contact centres are around any time of day or night. As well as phone support, it's useful to have a live chat facility for quick questions, delivered via your platform of choice, for example, email, WhatsApp or Messenger.
- ◆ **Ability to grow with your business** - you might be operating in one location today, but it's important to prepare for tomorrow. Check that the customer engagement platform offers support for your growth; whether that's supporting a multi store/subsidiary environment, or enabling trading in different currencies and languages.
- ◆ **What are the top automations that you need to deliver?** Since the Covid-induced online boom, customers have come to expect a significant number of interactions once they do business with your brand. We've outlined the most popular ones below. These should be easy to build, execute and monitor, leaving you time to focus on the custom data requirements that will deliver your competitive advantage.



- ◆ **Welcome programme** - also known as a welcome series, this occurs after a user first submits their email address, makes a purchase, signs up for a newsletter, enters a competition or completes an enquiry form. A welcome series is typically made up of a string of one or more automated message
- ◆ **Nurture campaigns** - often referred to as a 'lead nurture series', this is a series of emails that goes to a user if they've submitted an enquiry form but haven't become a customer within a certain period of time. The purpose of this series is to get them back to picking up a conversation with the sales team. A nurture series works perfectly with contact scoring and warming contacts up through the scores (from cold to red hot) with a series of communications.
- ◆ **Re-engagement** - use these to target those people who bought from you in the past but whose interest has waned. The platform should make it easy to divide your database into personas, including those who are 'lapsed' customers.
- ◆ **'ARN' automation** - alerts, reminders, and notifications: these are the useful, timely messages that reassure customers that all is well with their order, booking or enquiry. Customers expect these as standard, so make sure they're included at every appropriate touchpoint.
- ◆ **Post-purchase** - alerts, reminders, and notifications: these are the useful, timely messages that reassure customers that all is well with their order, booking or enquiry. Customers expect these as standard, so make sure they're included at every appropriate touchpoint.





CX segmentation

Create communications that actually matter to your customers

Having the right data at the right time is essential to a successful experience. We've all been on the receiving end of too many emails that bombard us with information and offers. Conversely, we've all felt the frustration of not having enough information, or for receiving it too late. Here's how to get it right.

Data and segmentation

The quickest way to create a personalised experience is to slice up your data and send contacts relevant information. Segmentation allows you to direct your budget into smaller, more targeted campaigns that should trigger a better response and give you a better return on your investment.

You can start with the ideal customers within your own database and use these as the basis for your personas. Relevancy and personalisation are key to ensuring we understand users behaviour and trigger the relevant message at the right time.

What is 'personalisation'?

Buyers and customers expect their marketing to be personalised. But what does that really mean? Here are some examples we can all resonate with:

- ◆ Opening up an app and seeing relevant product recommendations
- ◆ Visiting a website and being signposted to a relevant product or service
- ◆ Status updates such as an email and/or text to confirm that your recent order/appointment/delivery is confirmed or on its way
- ◆ Being contacted in the way that suits you best (e.g. post, email, SMS, WhatsApp)
- ◆ Seamless checkout, contactless payment, user-specific discounts

But first – data!

To create personalised customer experiences, you need to create a single data layer. This means unlocking data silos in your business and connecting them. This could involve using an external consultant who possesses the skills to join these moving parts together. Whoever you choose to manage this for you, they should insist on a full data audit to ensure the resulting database is the best it can be. For example, the data should be GDPR compliant, clean and from ethical sources.



Data segmentation – great ideas to get you going

When it comes to segmentation, there's no one-size-fits-all approach. What suits a B2C client won't necessarily be a good fit for a B2B. However, most segmentation falls into four camps:

- ◆ **Segmentation by customer type:** split your customers into 'pots' based on their purchase history, defined by the average number of purchases across a chosen timeline, and the average time between purchases. This is a traditional segmentation approach that works for most sales models. For example: leads, first time customers, active customers, lapsing customers and inactive customers. For service-based models and those with long periods between purchases, you could use renewal dates to set parameters for different segments.
- ◆ **Segmentation by interest:** this uses purchase behaviour to determine what customers are interested in. At its simplest, you'd break down your key sales by category (e.g. kitchens, bathrooms and garden products for a homeware store) then review all your purchase data, website tracking and email to place those with high 'scores' in those categories in those segments.
- ◆ **Segmentation by location:** this is a fantastic way to deliver localised campaign activity. Using a customer marketing platform, you would be able to identify all the contacts living in a specific radius or location and send emails specifically to that segment. Dividing your database into different country locations is also a powerful way to create a personalised experience, even if you operate thousands of miles away from your contacts.
- ◆ **Segmentation by engagement level:** the best customer marketing platforms work out how 'engaged' customers are with your communications by scoring their interactions with you. Someone who rarely opens an email might be a candidate for a monthly round-up, whereas an engaged subscriber who clicks on everything you send could receive more content.
- ◆ **Segmentation – how much is enough?** A word of warning: only collect just enough data to achieve the outcome you are after. It's tempting to ask for people's names, addresses, gender and much more, but asking for too much, too soon, will likely put people off. You will need to test this theory, of course, and in time you might gain enough trust among your subscribers to ask for additional information – for example, their date of birth – in return for an appealing offer or discount.

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CX email and automation

The role of email marketing and automation within your customer journey

A recent survey by the Content Marketing Institute revealed 87% of marketers use email marketing to disseminate their content. And for good reason: email usage is pretty much ubiquitous. In a Statista poll, an average 75% of internet users aged between 16 and 75 sent and received emails in the week prior to the survey.

So, what's the issue? Too. Many. Emails. Badly thought-out campaigns, a lack of segmentation or relevance and a disconnected customer journey is the fastest way to make your audience reach for the unsubscribe link. So how can you use email to create a great customer experience, and not a dismal one?

- ◆ **Automation explained:** In marketing, automation is a cover term for managing processes automatically across multiple campaigns and channels. Effectively, automation series are triggered based on a user's actions or behaviour, meaning you'll be delivering the right message at the right time, and, if you're thinking omnichannel, it'll be on the right channel too.
- ◆ **Why is marketing automation so important?** Simply, because it supports users throughout their journey. People don't like waiting around, and therefore it's important that you deliver the right message when the user needs it, based on their behaviour. For example, let's take a B2B scenario - a user has just submitted a form on your website, enquiring about your service, and they've also enquired with 5 other businesses. You want to get to them first, and therefore a welcome series that triggers confirmation of their enquiry and introduces them to the brand is perfect.

Automation technology is essential for building strong marketing teams as well as amazing customer experiences. Simplifying tasks saves teams time and money, allowing them to focus on creativity.

So what automations should you be delivering? We've outlined the most popular ones below.

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So what automations should you be delivering? We've outlined the most popular ones below.

6 key automations to deliver CX success:

_01 Welcome programme

also known as a welcome series, this occurs after a user first submits their email address, makes a purchase, signs up for a newsletter, enters a competition or completes an enquiry form. A welcome series is typically made up of a string of one or more automated messages and is the perfect opportunity to make a good first impression.

_03 Nurture campaigns

often referred to as a 'lead nurture series', this is a series of emails that goes to a user if they've submitted an enquiry form but haven't become a customer within a certain period of time. The purpose of this series is to get them back to picking up a conversation with the sales team. A nurture series works perfectly with contact scoring and warming contacts up through the scores (from cold to red hot) with a series of communications.

_04 Re-engagement

use these to target those people who bought from you in the past but whose interest has waned. The platform should make it easy to divide your database into personas, including those who are 'lapsed' customers.

_05 'Helpful' automations

these are your 'back in stock' / 'reminder of appointment' / 'abandoned cart' automations. Useful, and now expected as standard, so make sure you get these in.

_06 Post purchase

a successful post-purchase sequence thanks the buyer for their purchase, then sends follow ups to help them use the product or service for as long as possible. A learning series, regular check ins and upsell messages are all examples.

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CX and content

The relationship between customer experience and content marketing

Content and customer experience need to work hand-in-hand to deliver the right message at the right time. This makes sense, of course – you can have incredible insights from the data, but if you don't have the right message then you're wasting your time.

The good news: once you have gone through the process of creating your buyer and customer journey maps, you have a framework to deliver content for every stage.

Taking the example below – we start, as always, with our audience or persona, and build it out by creating content ideas for each stage of the buyer journey.



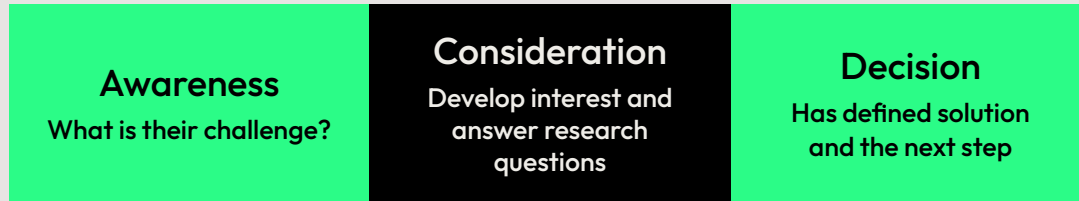
Kelly is a 42-year-old marketing director. She is a seasoned marketer and has experience of working with agencies. The owner of the business she works for wants to add an online shop to the website so people can search for products online and buy them directly. Kelly starts her buyer journey by typing questions into Google.

What else do we know about her?

- ◆ She is an active member of LinkedIn and trusts recommendations from her peers.
- ◆ Kelly lives and works in Manchester.



Journey stage



Kelly isn't sure whether her current website can support ecommerce. She's not sure what integrations are needed. She does have a budget in mind for the work but is open to the average spend. This is the perfect match for the kind of work that Agency 1, a marketing firm near her, can offer.

She starts her search by typing into Google. Agency 1 have optimised their content so that it is a match for her queries:

- ◆ Adding functionality to your WordPress website **[Guide]**
- ◆ Series of LinkedIn posts on the topic: 'Can WordPress support ecommerce?' **[Social media]**
- ◆ How to build an online shop **[Blog]**

Clear call to action copy means that Kelly enters her email address in exchange for a guide. She now enters the Consideration stage of the journey, and receives content to support this.

Automations mean that Kelly receives increasingly granular and relevant content the more she engages. The final step of this journey leads her to a case study for Agency 1, which convinces Kelly it's the one for her.

- ◆ How to build a case for a new software system **[Template]**
- ◆ How your marketing agency can support your customer journey experience **[Blog]**
- ◆ How Kelly's competitor created an online shop and grew revenue by 55% in 12 months **[Case Study]**
- ◆ How much does it cost to build an online shop? **[Blog]**
- ◆ What it's like to work with Agency 1 **[Review]**

A clear contact form allows Kelly to arrange a callback at a time that suits her. The sales agent at the Agency reviews his customer marketing platform to see all the interactions that Kelly has made with the company and sees that she is highly engaged.

- ◆ Arranges a meeting with Agency 1, a company that has built a website for a competitor **[Online Form]**
- ◆ Kelly engages the services of the agency and receives an email to welcome her onboard. **[Email]**

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How to enhance your content strategy

- ◆ **Segmentation:** Consider how technology can deliver personalisation at every stage – for example, segmenting downloads of a specific piece of content to a geographical area and following up with a personalised offer or event.
- ◆ **Measure, test and learn:** This applies to content just as it does for paid media, website performance and other traditional marketing metrics. Setting content KPIs from the outset is vital not only to determine the success of your efforts but to convince stakeholders of its value. Article views, number of reads, time spent on page, form fills, social shares – all of these fill that funnel to create an engaged community that is primed to buy. The number of followers and subscribers you have is another important KPI to track brand awareness, and the best thing is that these numbers are easily quantifiable.
- ◆ **Check engagement:** Genuine audience engagement such as comments and interactions on your content can help you understand how consumers feel about your brand. Tracking audience engagement can help you analyse which types of content your target audience engages with the most.
- ◆ **SEO:** Don't throw your content efforts down the toilet by failing to optimise your pages for keywords. Ensure that your content writers are armed with their SEO title, H1s and H2s before they type a word. Get them to seek backlink opportunities too – if your content is being referenced from credible sources, it's a sure sign your content is making its mark.

UX vs CX

The relationship between UX and CX

All businesses and organisations, regardless of operating model, recognise that their digital shop window has to be (at least) as good as the real thing. Why? Because UX – User Experience – is the tangible part of our story, and the part that leads to an overall great customer experience.



The difference between UX and CX

As we have learned by now, Customer Experience (CX) encompasses every touchpoint that a person has with your brand. It is the high-level vision, the flow, the journey. It is measured with things like 'rate your experience', NPS scores, and actual customer referrals.

In contrast, User Experience (UX) is measured on how it manages those interactions. A UX specialist is concerned with making things easier for the customer to move between the steps of the customer journey. It's about taking the core principles of usability and applying them to understand what might be causing a bump in the road, and streamlining this to remove any barriers that might be causing anxiety. A UX design is measured on things like:

- ◆ Task success rate
- ◆ Time on task
- ◆ Error rate
- ◆ Page views
- ◆ Time on page / bounce rate

How you think about UX and CX beyond marketing, into your website and beyond

Using UX best practices across the customer experience ultimately smooths and speeds up people's journey when they're considering your product or service. Any bump could slow the journey, or cause them to abandon it entirely.

Take the example of Jordan, 27, who is looking for a new pair of trainers. He's unsure of the make or model he likes, but knows the name of the brand.

He types in a few keywords, and because Brand X has an SEO strategy, he's able to land on the right part of the site quickly. The website loads fast and displays well on his mobile device. He navigates through the menus easily, narrowing down his search in just a few minutes to find what he's looking for. He works through the well-designed web pages to discover several one-tap payment options and boom – it's done.

In this example, we've focused on UX within your website, but the following tips apply to every part of your customer journey, whether that's how someone interacts with a social media ad, email or service centre ticket.



6 ways to embed great user experience into your CX

_01 Be functional

Yes, your content has to look good, but overly designed 'creative' touches run the risk of irritating users and slowing down the purchase process. Conversely, you don't want an ugly brand. You can still be functional while creating a buzz around your words and pictures.

_02 Be responsive

Whether looking up web pages, clicking on an email special offer image, or waiting on a chat facility, quick responses keep customers moving through the funnel.

_03 Be consistent

Be a stickler for your brand, so customers feel comfortable that you've got their back, even when you're moving around different parts of the customer journey. This is particularly important when you have data silos.

_04 Be useful

Check the fine details of the journey, such as alt text and information snippets, ensuring they guide your customer through to what they need. Make sure these elements read well and aren't an afterthought.

_05 Be clear

The ability to filter products by clearly defined attributes and price will decrease the time users need to spend on tasks/activities.

_06 Be compelling

Get to the customers' point quickly. Use FAQs and write headings around questions that people ask. Get your copy team to review the customer journey for signposting opportunities, prevent dead ends and get that journey flowing.

_07 Be concise

If pages have a large wall of text, consider adding more buttons to ensure that important content doesn't get missed.

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Reviews and CX

The power of social proof: why customer reviews are critical to CX

Humans rely on word of mouth to validate our learning and our decisions. In the days before the internet, we had little choice but to talk to other people if we wanted to know how a specific purchase worked out for them.

These days, especially in the post-Covid era, we're very comfortable with turning to the opinions of people we've never met in order to make or break a purchase decision.

The speed by which we can reach out to a dispersed network of people, all united by a choice to purchase a specific service or product, is mind-blowing. In just a few taps, one can narrow down several reviews of a single holiday package, complete with scores for key rating factors. Simply: we're happy to make a purchase, if other people say it's OK to do so.

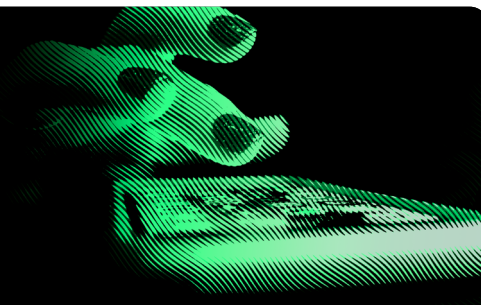
Reviews are important to the prospect because they:

- ◆ Represent unbiased opinions from real customers
- ◆ Can fill missing information around the product or service
- ◆ Provide reassurance in purchasing decisions

Reviews are important to businesses because they:

- ◆ Give a detailed picture of customer buying habits, who they are and what they want
- ◆ Highlight areas for improvement, whether in production, manufacturing, customer services, fulfilment, etc.
- ◆ Empower customers to strengthen the brand

Humans rely on word of mouth to validate our learning and our decisions.





◆ **Reviews – for every organisation** This ‘social proof’ is incredibly powerful, whether you’re a large ecommerce company or a smaller B2B firm. An ecommerce company lives (and dies) on a large number of reviews, for as many SKUs as possible. A service-based industry selling high-value, complex service lines would benefit from a smaller number of quality case studies or testimonials. Regardless of your operating model, reviews will be important for driving sales, just as long as customers are happy to create and refer to them.

◆ **Reviews and the customer experience** Whether you call them reviews, testimonials or case studies, these online content snippets play an interesting role in the customer journey. Typically, reviews are given when the customer is at their happiest – or conversely, at their most dissatisfied. Capturing customer sentiment at this point is key.

◆ **What tools are available to help?** A review-specific platform can be a huge asset for businesses that rely on the power of social proof. Good candidates are ecommerce merchants with many products. A simple post-purchase review email can encourage customers to leave a positive review in under a minute, but the biggest benefit of using a dedicated platform is around data. With a dedicated reviews platform, you can drive data into so many different areas; turning customers into product experts that do much of the selling for you, with the following benefits:

◆ **Self-serve content management** Ecommerce firms are generally restricted to basic product descriptions gleaned from whatever the manufacturer can provide. What reviews can do is add real-life context to products by people who are using them. Using a dedicated review site, ecommerce firms can link up the user generated content uploaded to the platform as well as social media sites, creating ever-richer mini catalogues for customers to review.

What this means is that customers can actually see how that fake plastic plant looks on a person’s bookshelf. They can see a video of how those size 12 leather trousers actually looked on a customer with the same measurements. It’s incredibly powerful.

◆ **Website conversions** These lovely customer nuggets can be pulled into your website and displayed wherever they will most likely convince the customer to part with their credit card: whether that’s on the homepage, or in a carousel display on the individual product page. A live feed has the advantage of keeping content as up to date as possible, which is critical in convincing customers – no-one trusts ancient reviews!

◆ **More compelling loyalty schemes** Integration with a reviews platform can add an extra dimension to your customer retention strategy. Let’s say a certain segment of your customer base responds positively to a request for a review – you could incentivize them to add further product details to build out product descriptions. This self-service element adds credibility to product profiles – for example, 80% of users confirm that the jeans fit ‘true to size.’

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- ◆ **More efficient product processing / returns** With all this information at their disposal, customers are far less likely to order a multitude of the same or similar products online in the hope that one will hit the spot. They are more likely to ‘get it right first time’, reducing their own frustration and saving the company money processing returns.
- ◆ **Upselling opportunities** Furthermore, review platforms can share this data with customer marketing platforms to uncover new factors/attributes that customers share, and to market to them accordingly. This allows for more granular targeting. For example, by attributing review data to those buyers of skincare products with known specific skin conditions, we can automate the experience, meaning buyers are more in tune with the product and more likely to return.
- ◆ **The downfall of only showing 100% 5-star reviews** Some companies don’t show less than perfect reviews to guard their brand. It’s understandable. However, review best practice is not to pull the negative feedback, but to keep it there and respond in the right way. Here’s why:
 - ◆ It’s good to know what’s being said about your company – and gives you an opportunity to fix it
 - ◆ Responding in a timely and efficient manner to negative feedback is a great way to strengthen your brand
 - ◆ It gives you a chance to engage with your customers in a way that you wouldn’t have done otherwise – to shine the spotlight on them, and turn them into ambassadors

Other than this, the problem with 100% positive feedback is, quite simply, that it looks dodgy. If you pull the negative stuff, people are less likely to trust you. Owning your customer complaints shows that you are a mature company to deal with.

And finally: how to handle negative feedback

Fortunately, technology is your friend here. A dedicated reviews platform can hone in on any negative sentiment and trigger an email to your team or specialist for them to handle. This seriously lifts the need to trawl through reviews, enabling you to manage by exception – at least, that’s what you’re aiming for anyway.

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Test and learn

The importance of testing and optimisation in your CX strategy

Thanks to new digital tools around data, segmentation and automation, brands can personalise their activities to increasingly sophisticated levels. But the important thing to remember is: your campaigns don't have to be right first time.

The beauty of customer experience is that you can test, analyse and, if needed, pivot quickly. The ability to split your data into increasingly granular elements and test parts of it reduces the risk to your investments while enabling you to see what's working – and what isn't. Moreover, you can test and optimise nearly every element of the customer journey.

This can be overwhelming in itself. So bear in mind to:

- ◆ Test over a prolonged period and to the same group
- ◆ Keep the test and control groups the same for a sustained period
- ◆ Test one variable to see the impact of the change

Test and learn – 5 top tips for success

01 Make sure to monitor

What you think of as the best message for that campaign, social media ad or webpage might not be the right one. Early, constant monitoring will allow you to see how things are performing, and to make quick changes.

02 Test across the funnel

Testing different aspects of the customer journey – not just at the awareness stage – will help you understand what turns customers on (and off) at different points. For example, different versions of a loyalty programme.

03 Test across different platforms

Slice up your content to make it appropriate for the technical requirements of each platform – whether that's email, website, SMS or social, for example – then test different elements to see how it performs. This will give you new insights: what works well with an email campaign might not translate well to a paid ad. A well-written, well-timed SMS might be just the thing to entice a defecting customer back to your brand.



04 Test different timings

As well as content: automating your content takes away much of the headache, but don't ignore the timeframes that you're currently using. Is 180 days after purchase the correct amount of time to send a reactivation email? You might not know until you've tested it. And by testing it against other timeframes, you'll definitely learn.

05 Start with easier, impactful changes:

Avoid the 'infinite changes' loop by focusing on simple tests to analyse key elements within the journey. Simple ideas to optimise your customer journey include variations in headlines, page structure (such as heading hierarchy, use of drop-down menus, workflows), imagery (on page, in backgrounds), call to action button copy and forms.

Ultimately, what you're looking to achieve is a baseline of what your current campaign looks like and to assess the impact of small, impactful changes over a specific period.

CX measurement

How to measure your customer experience success

Measuring CX success can be tricky, as customer wants and needs are changing all the time. However, we believe that CX metrics should be focused around the progression of people through the journey.

Are people going through the cycle faster? More smoothly? How quickly are they, unbeknown to them, completing the various goals you have curated through your social media strategy, website analytics and email marketing? With this in mind, here are some key tips for measuring success:

- ◆ **Set targets around what customers care about the most.** Not sure what that is? Survey them, carry out interviews, curate helpdesk information. Then set your goals around these KPIs.
- ◆ **Use measurable metrics** Set yourself measurable KPIs that can measure the impact of customer experience, for example - increasing customer lifetime value, reducing customer churn, and using more traditional metrics like email click-through rate.



- ◆ **Ease of doing business** How easy is it for someone to interact with your brand? Also known as a Customer Effort Score, this data is usually collected by a review or survey format. Also see the NPS (Net Promoter Score) – a gauge of how likely customers are to recommend you.
- ◆ **Track sentiment** Consider voice of customer tools that measure how customers are feeling, measuring the sentiment on forums, blogs and social media.
- ◆ **Don't forget customer retention** This is a huge part of your CX success story. We've already covered Customer Lifetime Value; in a B2B context, your personalisation and nurturing efforts should all push to increase renewals and reduce customer churn.

Top 4 retention tactics for long term CX

- _01 Personalisation**

What are you doing to convince your customers that you know them? Things like recalling their purchase history, receiving recommendations (e.g. Customers Also Bought...') and calling them by name all help to reduce churn.
- _02 Automated emails**

From a simple 'thank you', to time and behaviour-related emails, automating messages around customer needs is a proven way to engage customers over time.
- _03 Satisfaction surveys**

Where is your business doing well? How can it service your customers better? Automate quick, simple surveys at scale to get a better understanding of what makes customers happy.
- _04 Loyalty programmes**

A tried and tested way to get customers to keep coming back. Automation allows you to reward customers at scale by sending messages to those that meet certain criteria. For example: spending a specific amount, recommending to a friend or posting positive reviews.

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Why StrategiQ?

How StrategiQ can help you develop your customer experience

Today's customers are quite simply spoiled when it comes to customer experience. Big consumer brands are well ahead of the digital transformation curve, and do battle daily to claim (and retain) your trade. But with the right partnerships, every business has the ability to surprise and delight its customers.

Away from Silicon Valley, SMEs and aspirational businesses have work to do. But caught between the wants of the business and the needs of the customer, 'digital transformation' can feel a disconnected and intimidating place to be.

The challenge for most organisations is that a single marketing person (you?) is tasked with owning the entire customer experience effort. But really their job is to align the company's vision with the rest of the business, investing in partners to manage it.

That's where StrategiQ can help.

You might not be Amazon, with a thousand-strong developer army, but you are an experienced marketer with a vision. By investing in StrategiQ, you enter into a partnership: a place where we share knowledge, lift the burden and set strategy free.

Our agency brings strength, knowledge and unlimited thinking to your project, enabling you to:

- ◆ Create a shared vision for the future across your organisation
- ◆ Double down on what 'success' looks like, tied to value-adding metrics
- ◆ Set out a strategy, working alongside industry specialists in every area of marketing.
- ◆ Learn from, implement and apply best-in-class technology
- ◆ Implement, test, learn and pivot where necessary
- ◆ Quantify milestones and build a future-proof solution

A focus on customer experience can help to define what your business stands for, hone your brand and even develop new offers. Talk to us, and we'll show you where a renewed focus on your customer can significantly improve your bottom line.

"It only takes one person to mobilise a community and inspire change. Even if you don't feel like you have it in you, it's in you. You have to believe in yourself. People will see your vision and passion and follow you."

Teyonah Parris

Strategiq.

Advisory | Creative | Marketing | Tech

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