CX

6 easy steps to kickstart a killer CXM program

Improve the customer experience at every touchpoint

Welcome!

Managing the customer experience is easier than you think

"The customer is always right!" Right? Maybe not. But now that customers can interact with your business on multiple channels, and broadcast their opinions in an instant, "always" takes on a whole new meaning.

Although tracking and responding to customer issues across touchpoints may seem daunting, the reality is **you can easily and proactively delight customers with a solid customer experience management (CXM) program**.

All it takes is a better plan for collecting and acting on customer feedback. And we'll show you how to get started. In this guide, you'll get:

- Tips for identifying and mapping your customer touchpoints
- Survey design tips that help you hear from more customers
- Best practices for customer listening and real-life examples
- Ways to practice a long-term CXM program that drives growth

According to the Harvard Business Review, companies who've adopted a CXM strategy report having happier customers, reduced churn, and an increase in revenue.

What's customer experience management (CXM)?

Simply put, **CXM is a program companies put into place that helps them effectively listen and respond to customers**.

A good CXM program includes a company's:

- Awareness and understanding of every customer touchpoint

- System of collecting and responding to customer feedback

- Plan for measuring and tracking customer KPIs

- Ability to communicate issues effectively across teams

- Dedication to improving their employee performance

A great customer experience pays off

We surveyed 400 consumers to learn if a company's reputation for a great customer experience affects whether or not they'll buy from them.

It turns out a whopping **72% of customers say they're "very" or "extremely" likely to shop with a company or particular location** because of their reputation for outstanding customer service.

And that's not all:

After a "very good" or "excellent" customer service experience, how likely are you to tell your friends, family, or co-workers?

- Extremely
- Very
- Moderately
- Slightly
- Not at all
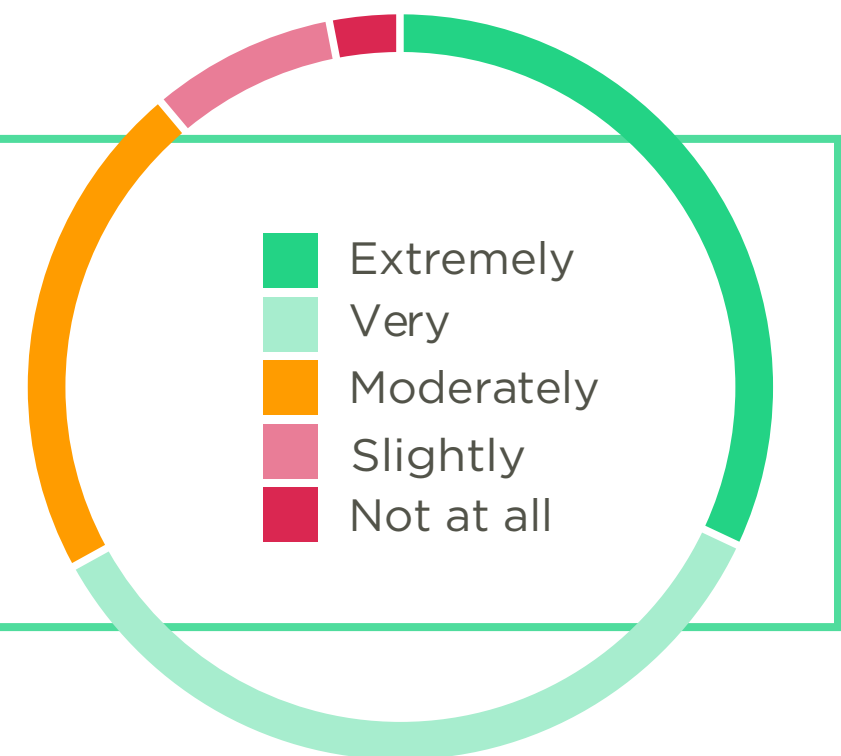
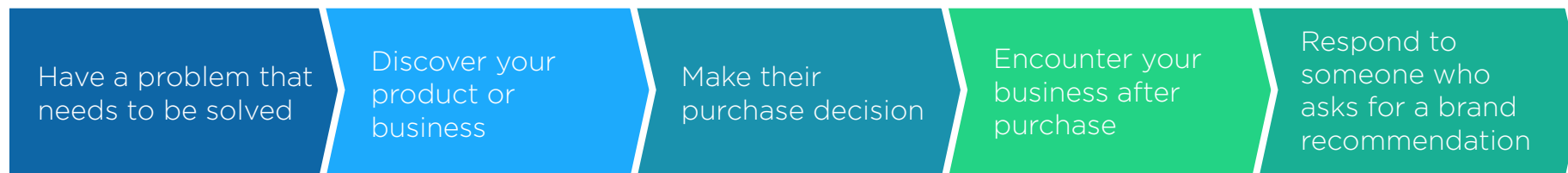# 6 steps to build an effective CXM program

Step 1:

Map the customer journey

Identifying your customer touchpoints

The first part of any good CXM plan starts with identifying and mapping your customer touchpoints. Grab a pen and paper. Ready?

Write down all of the points when, and how, customers interact with your business. **These are your customer touchpoints: every time a customer comes into contact with your brand—before, during, or after they purchase something from you**.

Need help? Put yourself into your customers' shoes, then walk down the path they might take as they:

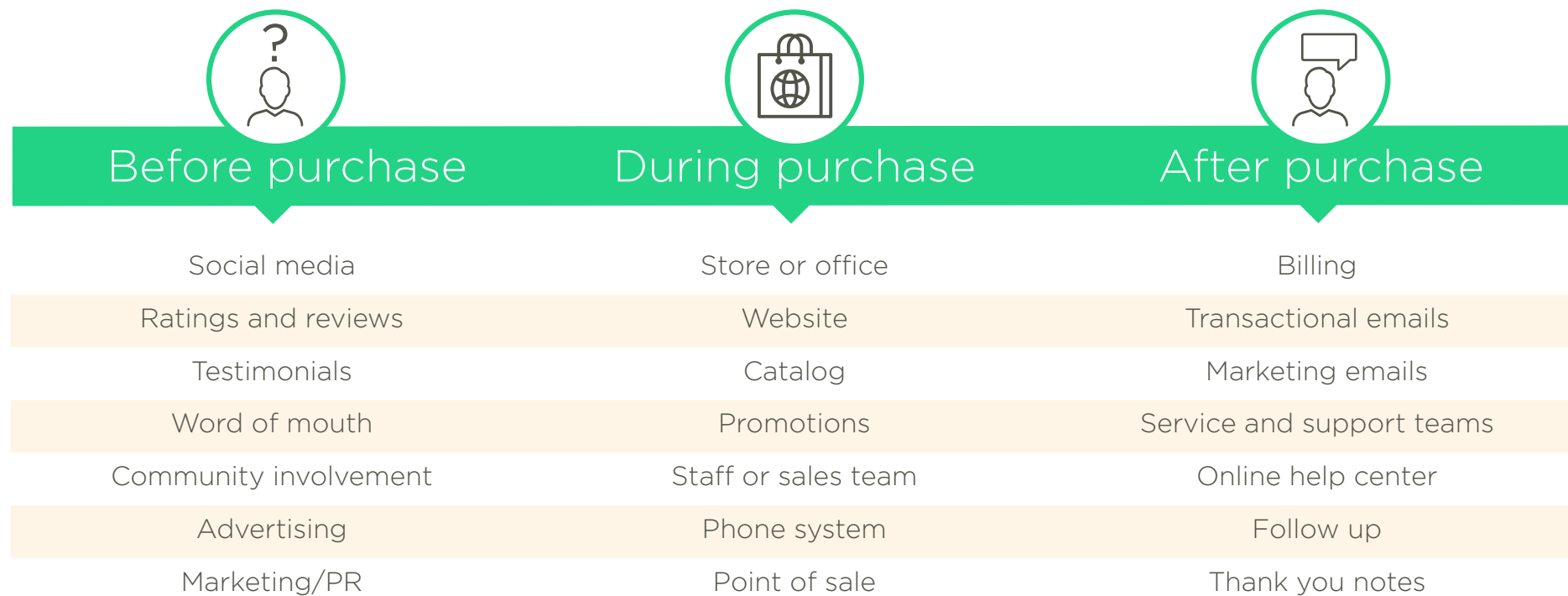| Have a problem that needs to be solved | Discover your product or business | Make their purchase decision | Encounter your business after purchase | Respond to someone who asks for a brand recommendation |

Mapping your customer touchpoints

Although touchpoints vary by company size and industry, here's an example* to help you get started.

Each of these examples usually includes several smaller parts. Someone who visits your website could see the home page, a product page, a checkout page, and so on.

Before purchase	During purchase	After purchase
Social media	Store or office	Billing
Ratings and reviews	Website	Transactional emails
Testimonials	Catalog	Marketing emails
Word of mouth	Promotions	Service and support teams
Community involvement	Staff or sales team	Online help center
Advertising	Phone system	Follow up
Marketing/PR	Point of sale	Thank you notes

After you identify all of your customer touchpoints, determine where you want to survey customers to get the feedback you need to improve.

*The social media touchpoint, found under the "Before purchase" category, could probably happen anywhere along the customer journey. So you may want to differentiate your touchpoints accordingly.

Step 2:

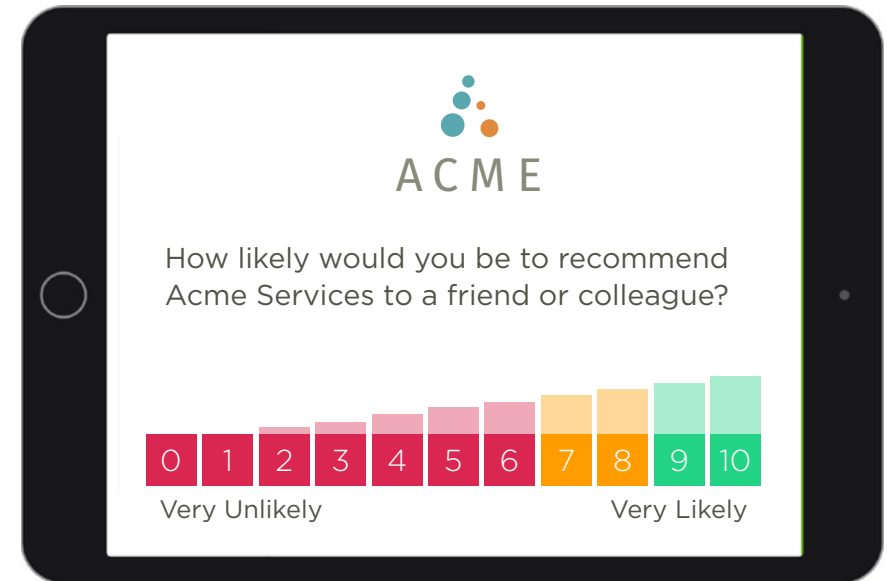Design surveys with
the customer in mind

The one question you need to ask

You should always include the Net Promoter Score® (NPS®) question in your surveys. Why? It's the industry standard for quantifying and tracking customer loyalty. It's also an easy way to differentiate levels of customer satisfaction across touchpoints.

The NPS question has been shown to predict the likelihood of both repurchase and referral.

Ask customers, "How likely would you be to recommend our company to a friend or colleague?" Then ask follow-up questions to find out why they gave you that score.

Want to learn more? Get our guide to NPS →

ACME

How likely would you be to recommend Acme Services to a friend or colleague?

| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Very Unlikely   Very Likely

Net Promoter Score and NPS are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

3 survey design tips for collecting customer feedback

The first part of implementing a great CXM program is knowing how to collect customer feedback. But if your surveys are complicated or send the wrong message, customers more likely to keep their thoughts to themselves.

Whether you're surveying through email, on social, or after customer service interactions, **follow these tips to ensure your surveys get lots of quality responses.**

Why start from scratch?

If you're not sure what questions to ask or don't have the time to draft a survey, rely on survey templates written by experts to get you reliable results.

Start broad, then focus

ACME

Think of your survey as if it's a good story. Your survey question order should have a natural flow, giving customers context before you get into specifics.

What this means in practice: **Set the stage by asking customers to think broadly about your company or their experience.**

For example, try using the general NPS question, **"How likely would you be to recommend our company to a friend or colleague?"** Then ask specific, targeted questions about why they gave that score and how they would rate your product in different categories.
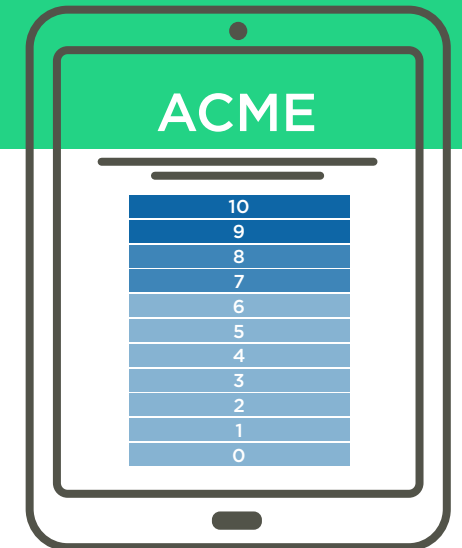
Keep it short and relevant
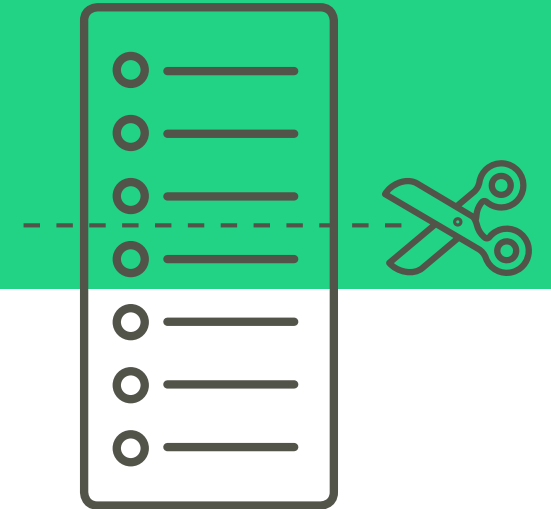
Chances are, you're a customer too. When giving feedback, do you want to spend a bunch of time answering a long survey?

Probably not. And our research shows **45% of people are willing to spend 5 minutes completing a customer feedback survey, while only 33% are willing to spend up to 10 minutes**.

Keep surveys relevant by segmenting your customer base and sending them targeted surveys. For example, send a customer a survey specific to their purchase rather than all the products your company has to offer.

That way, a customer who has never purchased coffee doesn't rush through 10 questions on how much they like your latest roast.

Then, ask only questions that'll yield valuable insights. Make sure you prioritize the questions you want to ask, staying focused on your survey goal.

Make surveys look great on any device

Part of ensuring a great customer experience is by staying consistent with your branding. A good survey platform will give you the option to **customize your survey's look and feel, from colors to logo**.

Plus, more and more people are taking surveys on mobile devices. **Avoid too many questions on each page, which means more scrolling.**

And keep open-ended questions like comment boxes to a minimum. Typing long responses using a tiny keyboard may deter customers from taking your survey.

Finally, test your survey on multiple devices to make sure it looks and works great anywhere.

Step 3:

Listen to customers at every touchpoint

Be available and proactive

Once you've developed your customer feedback survey, make sure customers can tell you what they think anywhere, anytime.

In fact, research published in the Harvard Business Review shows **just the act of asking customers for their feedback makes them happier—and can increase their likelihood of shopping with a brand again**.

Plus, by staying accessible, you can prevent unhappy customers from jumping straight to social media to complain about your brand publicly.

Capture a steady stream of data

Instead of sending one survey to all of your customers once a year, **send several surveys to fractions of your customer base at regular intervals**.

For example, survey 1/12 of your customer database per month. That way, if you wish to do a personal outreach, your team will have the bandwidth to respond to all customer responses.

Plus, you'll collect a constant stream of feedback you can use to stay ahead of trends and monitor your progress.
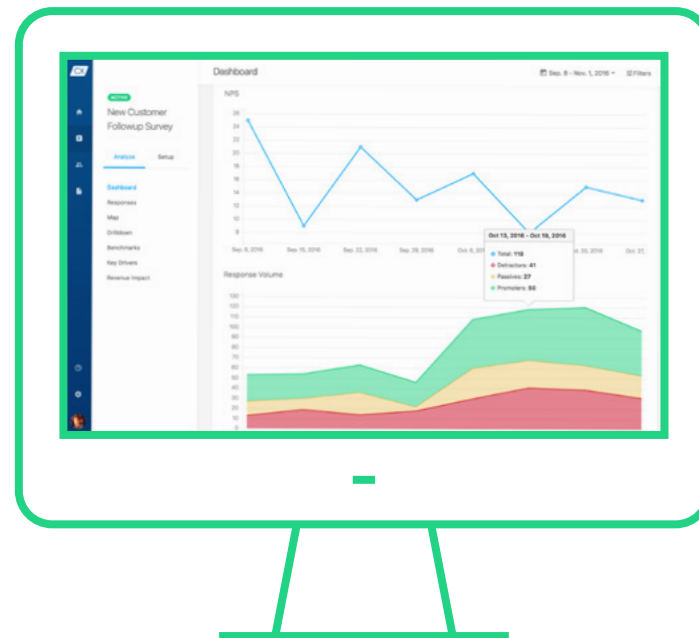
Touch base at every touchpoint

It's not enough to determine overall customer satisfaction. **Though your product might be great, if your website is hard to navigate or your customer support is taking too long to answer support requests, customers may abandon ship without telling you why.**

How will you know if you're not asking for targeted feedback every step of the way? You can quickly check in with customers at every meaningful touchpoint by triggering customer feedback surveys from your app, CRM, or marketing automation.

After a customer purchase, app download, or customer service interaction are some important places to check in with customers and immediately intervene if they're not happy with their experience.

Plus, sync that data back to your CRM to get valuable context for your CRM data, which often only shows basic customer and prospect information without the "Why?" behind their behaviors.

Step 4:
Analyze and understand the results

Digging into the data

After you start regularly checking in with customers, you data will pile up quickly. **A good CXM platform will give you a way to collect feedback, capture key metrics, analyze performance, and track your progress over time.**

Nextdoor

Using customer feedback to inform business strategy

" Nextdoor is committed to delighting our members. Surveys are the way we track whether we are meeting this commitment and a critical tool for helping us understand how we can do better. We're using this customer satisfaction data to change the way we handle certain types of support cases and also to identify which of our agents need additional training. "

**Lindsey Buich,
Neighborhood Operations
Product Specialist,
Nextdoor**

Understand key drivers behind your customers' NPS score

Let's say a customer gave you a 2 NPS. The next logical question is why? Can you tell what's driving that low satisfaction level?

Your customer might be very satisfied with your product's ease of use and customer support professionalism. However, they might be dissatisfied with your product speed, and that might be the factor that weighs most in their mind when assigning an NPS.

Look for a platform that understands not only each variable contributing to your NPS, but also their relative importance.
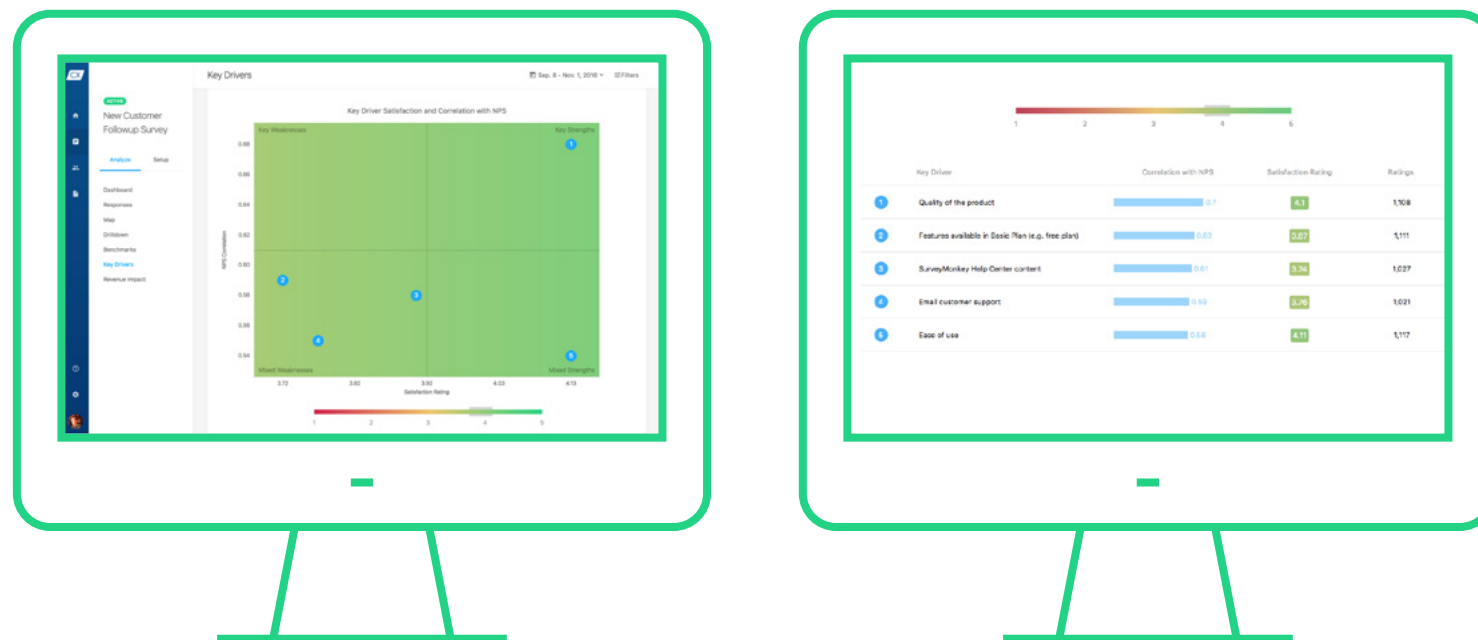
Drill down and identify nuances

Your platform should be able to **drill down into your customer feedback to identify which factors have the strongest impact on your customer experience**. Is your NPS different by store location, service rep, or product? Did customer satisfaction dip after a feature launch?
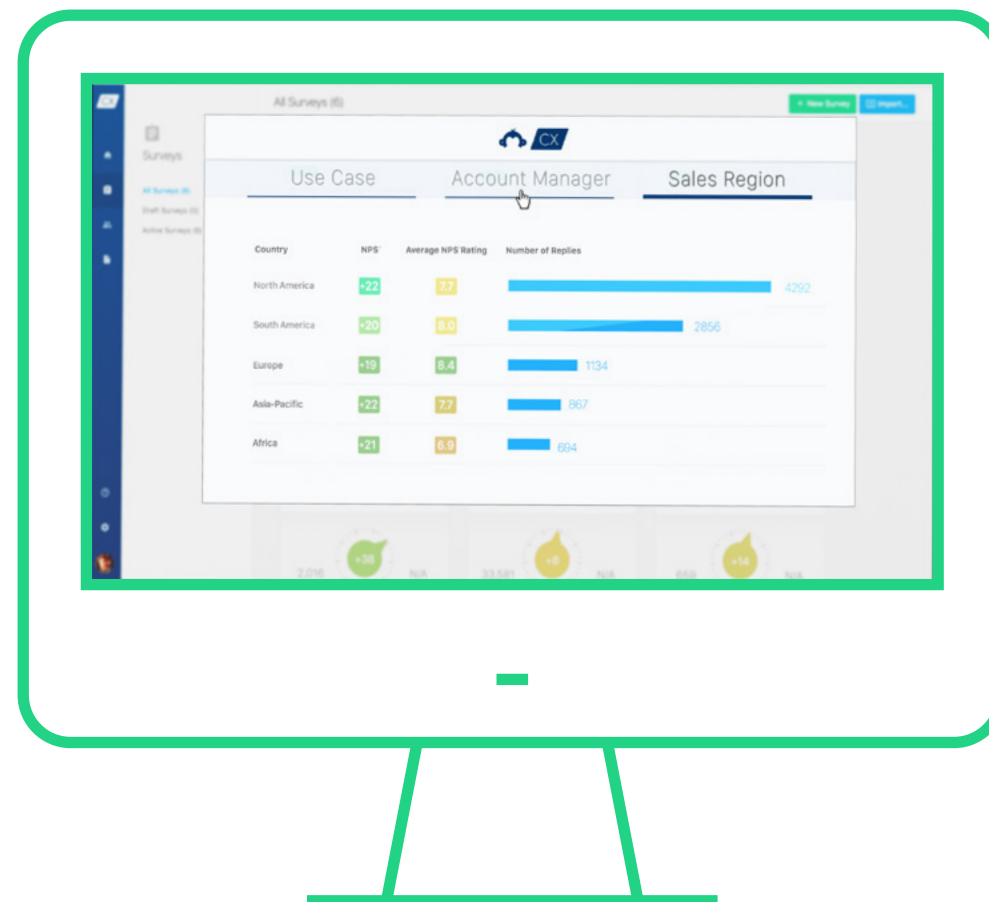
Automated categories

It's just not scalable to go through every customer response by hand. **Look for tools with auto-tagging capabilities that help you categorize open-ended responses to easily identify trends.**

For example, comments that contain words like "price, cheap, inexpensive, affordable, economical, and budget friendly," could be automatically categorized as "affordable."
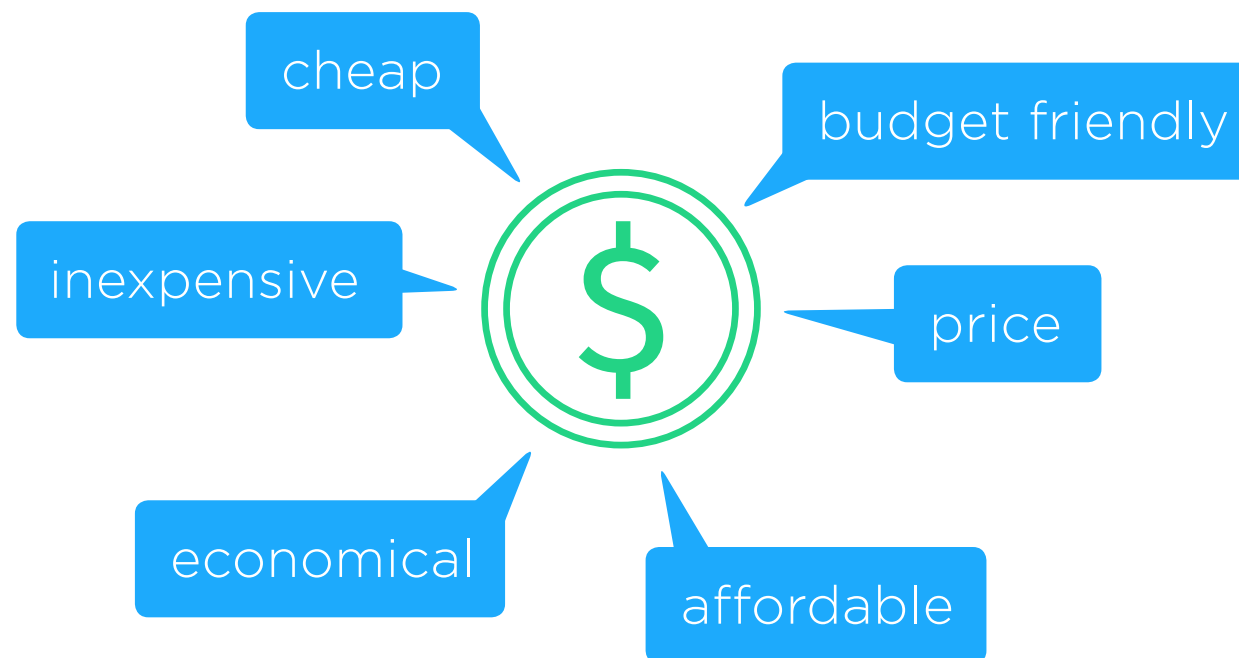
Context matters

Some CXM platforms offer benchmark data from competitors in your industry. **If your NPS is 41, for example, how do you know whether that's good or bad?** Although it's "only" 41, you'd feel good about it if you know you were in the 99th percentile compared with others in your industry.

Staying focused with the big picture

Pivotal Labs is an industry-leading consulting firm helping companies improve their agility in developing mobile and web software.

While the business always fostered a "feedback culture," their informal methods of collecting customer feedback often meant they couldn't scale across teams or do much with their data.

Now they regularly survey their customers—and get valuable context for their NPS—by benchmarking against industry standards.

> " It's incredibly valuable to be able to gauge the satisfaction and loyalty of our client relationships we are help them transition to a modern software development approach. SurveyMonkey's ability to benchmark our Net Promoter Score helps bolster our customer feedback loop to ensure our service is world class…We need a quantitative way to know where we stand with customers. "
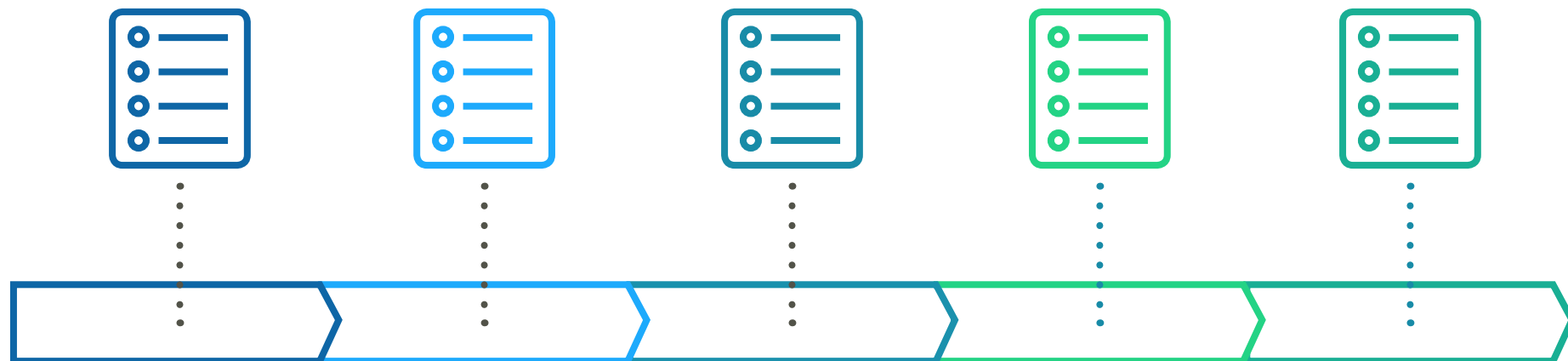
Paula Kwan, Corporate Strategy, Pivotal Labs

Step 5:
Take action by making
connections that count

Smart ways to automate

By proactively sending surveys at every touchpoint, you're more likely to hear from customers at every satisfaction level—not just the customers at extremes who are motivated to go out of their way to get in touch.

Personalizing the customer experience

Make sure your CXM platform can segment customers based on their NPS and allow you to track whether follow-up actions have taken place. For example:

- Forward negative feedback onto a service rep so they can prioritize customer care

- Thank your happy customers for their feedback and ask them to write a product review

- Recommend related products to customers based on their interests or feedback
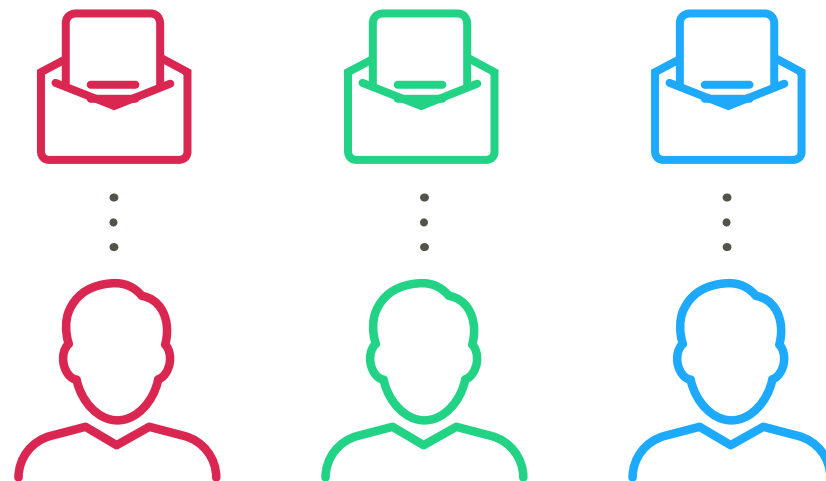
Survey says: Customers and businesses don't see eye to eye

We asked more than 1500 consumers and business employees to identify if there are any gaps between customer and business expectations. Here's what we found.

3 in 4 businesses say customers are their #1 priority

But most customers think businesses put profits first

When deciding to make a purchase, 58% of customers look at ratings and reviews online

But only 33% of businesses take online reviews seriously when evaluating customer feedback

So how do you close the gaps? Get everyone in your organization to prioritize the customer experience. Keep reading to learn how.

Step 6:

Get everyone on the same page
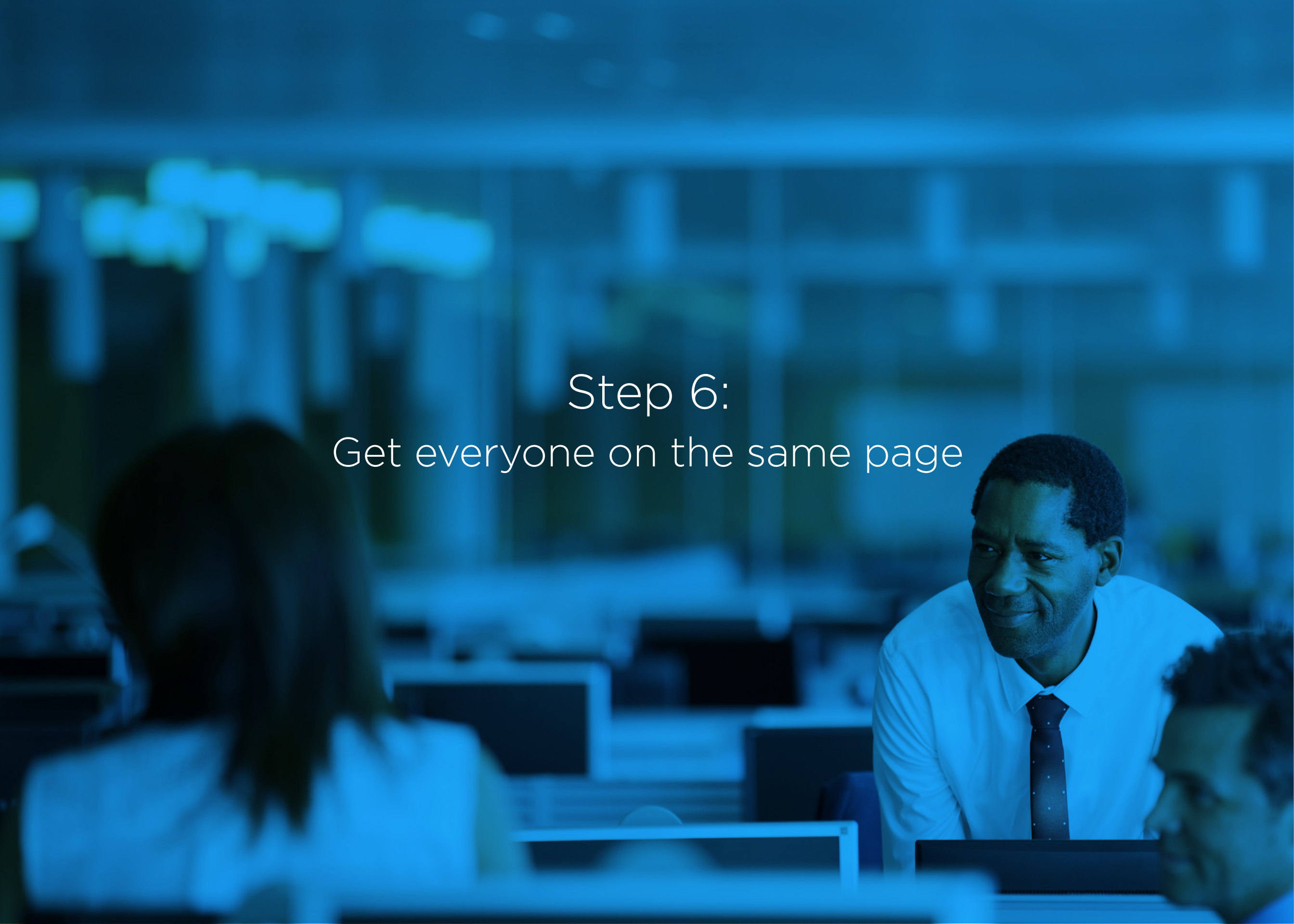
How to work better together

"We love our customers!" You talk the talk—now walk the walk. Once you have your feedback channels in place, **CXM becomes a never-ending process of self-assessment throughout all levels of your business**.

A successful customer experience strategy is all about visibility and communication. **Share customer feedback regularly across teams to make sure they go through their daily operations with a customer-centric mindset.**

- Generate feedback reports customized to marketing, sales, customer success, and product teams for an easy way to scale targeted improvements to the customer experience.

- Ask colleagues to keep an eye out for negative and positive feedback on your social channels. Give them a central place they can share feedback with your entire organization.

- Find out which of your customer service reps are getting the highest ratings and why. Identify your top performers and ask them to lead by example.

Soaring above their competitors

Though some say a company's focus on people, not profits, is bad for business, Virgin America, the California-based domestic airline founded in 2007, continues to report year-over-year growth.

When you think about it, Virgin America's success is impressive considering the challenge of breaking into an industry that faces many obstacles.

So how did they do it? They set themselves apart by showing customers they care, collecting feedback and improving the customer experience at multiple touchpoints, says Luanne Calvert, their Chief Marketing Officer.

"Instead of other airlines that you're kind of reliant on when the trolley happens to roll over your foot down the aisle, we encourage people to do their own ordering. So we wanted to make sure that people actually had the right selection that they wanted—so we used SurveyMonkey as a way to revamp our catering menu."

It's one thing to collect customer feedback—and it's another to turn it into action. Former Director of Customer Loyalty, Phil Seward, explains how the airline uses the data:

"The important part about the survey results is that they affect every part of the operation and they're shared across all departments in the business. What we're able to do is to get down into the detail and understand how that guest experience can actually affect our operations across the airline."

Read more about how Virgin America personalizes their customer experience.

Remember:
Survey, analyze, act, repeat

CXM practice makes perfect

Once you have a CXM program in place, make sure you continue to monitor your progress both internally and externally.

- **Hold employees accountable.** With a CXM metric like NPS, you can track improvements at the individual, departmental, or organizational levels.

- **Monitor customer satisfaction over time.** While the hope is that your customers will continue to remain happy, your satisfaction levels will have good days and bad. **Staying on top of the ebbs and flows of your customer satisfaction will help you retain business and stop problems before they get out of hand.**

- **Get ahead of industry trends.** You aren't the only company working to improve your customer experience—with the right CXM platform, you can monitor your brand's industry reputation in real time.

Kickstart your CXM program today

Collect customer feedback at every touchpoint and take meaningful action with SurveyMonkey CX.

See how it works →