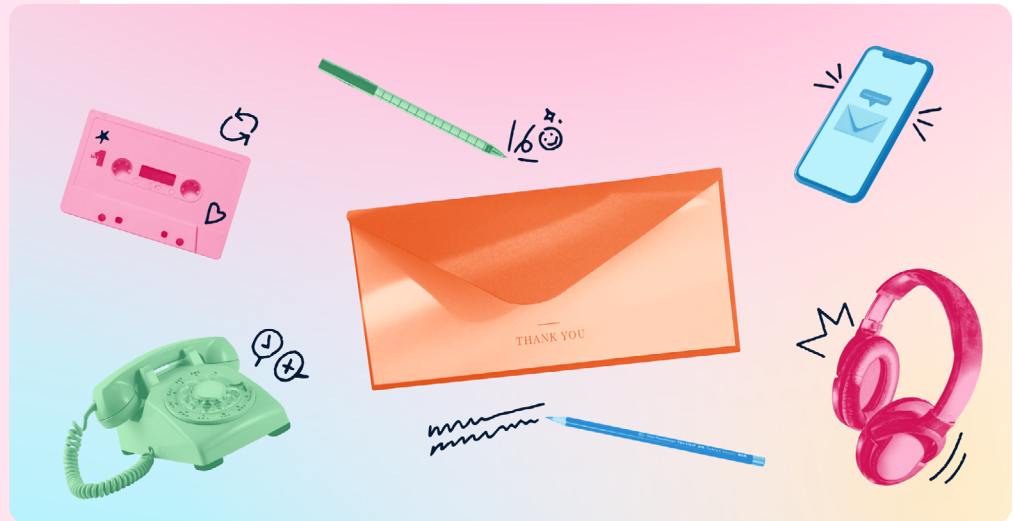


Front

A complete guide to customer communication



Businesses invest so much money, time, and strategy in talking to customers. But true customer communication is an ongoing dialogue. Learn everything you need to know about it in this comprehensive guide.



MATTHEW KLASSEN,
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December 2022 · 40 Minute Read

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Why do we need a guide for customer communication? And why this guide? Why now?

In practice, businesses have been communicating with customers for as long as businesses have been around. At the most deconstructed level, it's just a simple, one-to-one conversation between a vendor and a client — in other words, it's just two people talking.

But these days, modern businesses communicate with customers in so many channels and in so many ways, from the ads we see on our social media feeds to the emails we get in our inbox — ways you might not think of, like messages that pop up in software products, SMS texts, or videos on YouTube.

And behind the scenes, these companies could be using any number of technologies to send those messages, from regular old email to marketing automation to customer relationship management (CRM) software.

There's content aplenty on the meaning and methodology of those technologies. And none of them would really be within the scope of this guide. They're not really what we're talking about when we talk about customer communication. So what is customer communication, then?

Customer communication is the ongoing dialogue between a company and its customers.



“The limiting factor is no longer the product. It’s the customer.”

Now, that sounds a bit simplistic, but let’s dig a bit deeper on a few of those words:

- **Ongoing:** Very, very few businesses survive and grow powered by one-time transactions that never repeat. And those that can are typically fueled by large purchases that require repeated conversations pre-sale to negotiate the transaction as well as repeated conversations post-sale to service the product or ensure satisfaction. We’ll talk more soon about why recurring revenue is increasingly supplanting the few one-time purchases we make. But it’s important to know that successful companies nurture ongoing relationships with their buyers.
- **Dialogue:** Advertising, marketing automation, mass media – they’re incredibly effective megaphones that allow businesses to reach millions of people with relatively little investment. But they they’re all “one-way” megaphones. Customer communication is about two-way conversation, which means you need to be listening at least as much as you’re speaking. This is the biggest gap we see in business today – all companies have strategies, technologies, processes, and people in place to talk to customers. Few have equal (if any) intentionality in how they listen. We’ll talk more about why listening is important and how to do it.
- **A company and its customers:** There’s an inherent asymmetry to customer communication, and it’s the biggest obstacle we see across businesses of all sizes. As you add more and more customers, it gets harder and harder to talk to all of them effectively. That would be true for a company that’s just a single proprietor, but it’s (maybe a bit counter-intuitively) even more complex for businesses that sell to other businesses. The more individuals involved in a relationship, the more moving pieces that need to be coordinated. Individual people need a collective context to inform their conversations, and they need to speak with a consistent voice and message. And they need to do it all for hundreds or thousands of customers – each one made up of hundreds or thousands of individuals.

This ongoing dialogue is a living story written and rewritten on a daily basis with every email, every phone call, every video meeting, and every transaction. All these tiny interactions, these indelible connections, this continuous back-and-forth flow of information – it’s what builds stronger relationships.

Why customer communication matters

Your customer relationships are precious to your company, and customer communication is how you nurture, protect, and grow them.

In the past, the limiting factor that drove the delicate balance between supply and demand was always the product: how much could you reasonably and economically manufacture?¹ But in the age of software-as-a-service and cloud technology, more and more businesses are shifting to subscription models or recurring payment structures.

Why?

It’s because the limiting factor is no longer the product. It’s the customer.

With fixed R&D and distribution costs, you can theoretically sell a digital product an infinite number of times. And as you scale, the only costs that scale with you are the costs to service the product. That means the ceiling for your company’s growth is how much demand there is in the marketplace. And because entry costs are much lower than they are in manufacturing, competition can be pretty fierce. It’s easier than ever for your customers to leave. Which means every customer you have is precious.

It’s at least five times as expensive to acquire a customer as it is to retain one.² And a 5 percent increase in your retention rate can increase your company’s profits by as much as 95 percent (also according to Bain & Company).

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¹ Moore, G. (2017, June 14). The Manufacturer’s Dilemma. Retrieved June 5, 2020, from <https://www.linkedin.com/pulse/manufacturers-dilemma-geoffrey-moore/>

² Gallo, A. (2014, November 05). The Value of Keeping the Right Customers. Retrieved June 5, 2020, from <https://hbr.org/2014/10/the-value-of-keeping-the-right-customers>

Product alone can't guarantee retention

Selling a great product at a competitive price isn't enough to retain customers. It's often what will win new customers, but the number one factor in predicting customer churn (when a customer leaves) is a poor customer experience. Customers who are unhappy with their service experience — read: their interactions with your team members — are four times more likely to churn than the ones who are unhappy about price.¹

And yes, those interactions are happening in the product too — which is why your customer communication strategy needs to include in-product messages. But it's also important to remember that a great experience has just as much to do with results as it does with emotion.

Those experiences don't happen by accident. They're shaped by every message you send. Every phone call and every email. The ones you send and the ones you receive. And they're shaped especially by the conversations you don't have.

That's why a strategy built around individual interactions as opposed to the entire journey across teams is shortsighted.² When you only measure and improve individual moments like:

- The first onboarding call
- A support ticket
- A price increase

And you don't look at those "moments of truth" as part of a whole journey, you'll lose customers and wonder why it happened.

Think of it like this instead:

- Your onboarding team knows what was promised during the sales process, so they deliver on expectations during the first call.
- The support team has the context of the customer's onboarding conversations at

their fingertips, so they can get to the root cause of the issue faster.

- The account manager can build on a successful support experience at the right time with the right message to communicate a price increase or capitalize on an expansion opportunity.

Why companies are under-invested in customer communication

It turns out customer communication is a lot more complicated than it used to be! But the good news is the science and practice of customer communication has changed dramatically in the last few years. Unfortunately, lots of businesses are caught up in old ways of thinking.

For example, we already talked about the importance of communication as a dialogue. Nearly every company has significant operational investments in things like marketing automation, digital advertising, and demand generation to attract and nurture prospects toward buying their product or service.

But how much do those companies spend or even think about their ongoing conversations with their customers? What systems and processes do they have in place to have back-and-forth dialogue at scale?

It's clear that the ROI of investment in your existing customer base is massive compared to the ROI of every dollar spent on new business. (Remember that stat from Bain & Co?) You should be investing in customer communication at least as much as you're investing in marketing to prospects.

This ebook will show you how to structure and operate a best-in-class customer communication strategy. It's not meant to be a sales pitch, but hopefully it will convince you that there's more you could be doing to create better conversations with your customers that result in longer, stronger relationships — as well as giving you a clear path to making it happen for your company.

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¹ Dullweber, A. (2018, August 31). Turning on utility customer loyalty. Retrieved June 5, 2020, from <https://www.bain.com/insights/turning-on-utility-customer-loyalty/>

² Pulido, A., Stone, D., & Strevel, J. (2018, January 08). The three Cs of customer satisfaction: Consistency, consistency, consistency. Retrieved June 5, 2020, from <https://www.mckinsey.com/industries/retail/our-insights/the-three-cs-of-customer-satisfaction-consistency-consistency-consistency>

CHAPTER 1:

The fundamentals of customer communication

There are four things to think about when you think about strategic communication of any kind — with anyone:

1. Right message
2. Right messenger
3. Right time
4. Right medium

It's the same with customer communication, except like we talked about in the introduction, the stakes are a lot higher to get the "right" part, well, right.

Let's talk about what each of the four means in that context, and break it down into some actionable axioms.

1. Right message

In casual conversation, we don't tend to give a ton of thought to what we say before we say it (though we probably should!). That's not good enough when it comes to business conversations. The good news is, we have a lot more capacity for forethought and strategy in this context.

There are three things every "right message" needs to be:

1. Accurate: This is pretty obvious in theory, but it's tough in practice. Whether you're resolving a support request or making a sales pitch or just checking in, it's so crucial that what you're saying is true. No-brainer? You might not be surprised to see how often companies communicate inaccurate information. You've probably gotten a few bad messages yourself. It's not happening out of malice — it's happening because there's not a process to:

1. Get the correct info into the message, and...
2. Double check the message for accuracy.

Accuracy checklist:

- Do you have a repository of accurate, up-to-date information that's easily accessible and at your fingertips as you're messaging your customers?
- If you don't know the right info, can someone who does quickly "tap in" to make sure the message is right?
- Do you have a simple way for your team mates to catch and correct mistakes before the message is sent?

2. Helpful: Your message might have the right info, but if it's a dead end, it can be incredibly frustrating to the customer. It's one of the biggest drawbacks to the "self-serve" model of customer service. The guide or the bot is guiding you down a path that may be technically accurate, but it's not solving your issue. You know what these messages look like — or rather what they feel like to read: pure frustration. Why does this happen? Companies often make deliberate decisions to sacrifice a certain amount of helpfulness to achieve a certain amount of scale. Sometimes this looks like cold mathematics: "100% automation for 25% of customers results in a 5% reduction in recurring revenue with a 10% reduction in costs." But more often, it's either:

1. An inflexible, impersonal communication workflow, or...
2. A misunderstanding on what the actual problem is — usually caused by a lack of context.

Accuracy checklist:

- Do you have a system that quickly and seamlessly flexes to bring a human perspective to the conversation?
- Do you have easy access to the contextual history of the customer relationship that can help you be helpful?

“You should be investing in customer communication at least as much as you're investing in marketing to prospects.”

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3. Personal: These days, we all can pretty easily sniff out automated messages. We know they're coming, and no custom "first-name" token in the greeting is going to fool us. These automated, one-to-many messages are the definition of that impersonal, one-way megaphone we talked about. But what's the alternative for businesses? You don't communicate at all? Miss out on vital opportunities for your business? Or do you hire thousands of people to spend all day writing personal emails or making personal calls? The good news is that technology offers us a middle path. We think a scalable, personal message can be made up of three parts:

a. Templated information:

The facts you want to communicate. This is the stuff that takes way too much time to draft individually, and it's going to be exactly the same for multiple people even if you were to draft each message from scratch. Things like invoice numbers, steps for processes that don't change, or introductions about yourself and your company.

b. Tokenized information:

There's a lot more to tokens than "first-name" and "company-name." A sophisticated system built on rules and data can tokenize whole parts of the message to the

recipient — and the sender. It doesn't make a message less personal because a computer rule saved you the time of typing out your salutation or the time of the webinar.

c. Custom information:

This is where the individual comes in and can add that personal touch. It takes a fraction of the time, but it makes a world of difference to the reader. And this goes even further when you have the context of previous conversations at your fingertips to jog your memory and inform what you write. You glance back at a previous conversation, remember an issue, and follow-up to check in on it. It's hugely impactful.

Personalization checklist:

- Can you tokenize and template the time-consuming parts of your messages that need to be consistent for large audiences?
- Can you personalize each message quickly and easily to make more impact with a fraction of the time?
- Is it simple to access contextual information and conversation history so you can make each message even more personal and helpful?

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2. Right messenger

In B2B, everything has more moving pieces. One company sells to one company, but there could be thousands of interconnections between individuals at each company. Having the right message depends a lot on having the right messenger.

Scale compounds this problem even further, because of specialization. In the early days of a startup, one or two people might hold literally all of the knowledge base of the company in their heads. They sell the product, service it, maybe even engineer it! No matter what an inbound message contains, they'll be able to answer it.

But as you grow, you specialize more. Now your sales team can't answer support questions. Your support team can't answer pricing questions. And so on and so on. This helps you scale your company efficiently, but it fragments the customer experience. Businesses often invest in operations to improve those experiences by:

- Speeding up support resolution
- Enabling sales and marketing
- Hiring customer success managers

And each of those investments can make a huge difference in improving those individual experiences, but they don't address the whole experience across the customer journey.

The way we see it, a holistic customer communication strategy needs to do two things at the same time:

1. Connect the customer to the right person on your team every time, and...
2. Connect your teams to each other across functions to unify the customer experience.

3. Right time

In 2016, just 4% of customers¹ said they expected an immediate response from a vendor to their emails. These days, that number is higher than 37%.²

“Immediate” is, needless to say, really fast. That’s why companies pressure support teams to fly through message after message. They measure and track incremental improvements in CSM behavior and “growth-hack” their operations. They sacrifice quality for speed.

Timing is crucial — clearly customers are basing decisions on how fast you can respond. But how can you do it accurately, helpfully, and personally at the speed of light?

Here are three metrics you can use to get more insight into your processes, so you can improve response times without compromising quality.

1. Busiest day and time

Just like a restaurant has a lunch rush or a dinner rush, chances are high your company has a “message rush.” Do you know when your team is the most swamped? When you know, you can better prepare for high-volume days — or even high-volume hours. Look at the patterns in the spikes and drops that occur every week to come up with a team-wide schedule that allows your reps to concentrate on inbound messages when it matters most and still have the time to get the rest of their work done. Then you can:

1. Block time for employees to be on call during the team’s busiest days and times.
2. Rotate individual team members through fast-response shifts during slower periods.
3. Schedule meetings and collaborative projects during your team’s slowest days and times.

By optimizing your team’s schedule, you ensure your everyone can make the best use of their time at every hour of the day. You can even choose to adjust your teams’ working hours — perhaps starting earlier or later to accommodate other time zones — to account for higher volume periods.

2. Reaction time

Not all inbound messages have the same urgency. An important request from your biggest customer needs a quicker response than a casual question from a curious prospect. So just as important as response time is “reaction time.” It’s a different metric than response time, because a “reaction” could be any action you take — like tagging a message for immediate reply or snoozing it for later based on the level of priority. And unlike response time, your reaction time could actually be too fast.

Studies have shown that the more high-stakes decisions you have to make, the lower the quality of each of those decisions is.³ When we’re faced with several issues, our brains are hard-wired to pick the easiest ones, not the highest-priority ones. As social Psychologist Roy F. Baumeister explains, “Good decision making is not a trait of the person, in the sense that it’s always there... It’s a state that fluctuates.”⁴

A low reaction time is a red flag that your reps are getting bombarded with too many support messages at once—even during your low volume times. Look at team average and individual reaction times to see if your team is staffed to handle the volume of requests you’re receiving.

If you find that several of your team members have high reaction times, it could help to adjust your inbox sorting system so that incoming messages are prioritized and assigned appropriately.

Here’s an example of how you could use tags to indicate urgency for a software support team, for example:

High urgency:

If the body or subject line contains words like “bug,” “glitch,” or “problem,” you can add a “high priority” tag.

Medium urgency:

If the body or subject line contains the words “upgrade” or “switch plans,” add a “medium priority” tag.

Low urgency:

If the body or subject line contains “feature request,” add the “low priority” tag.

“The more highstakes decisions you have to make, the lower the quality of each of those decisions is.”

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¹ Vanderkam, L. (2016, March 29). What Is An Appropriate Response Time To Email? Retrieved June 5, 2020, from <https://www.fastcompany.com/3058066/what-is-an-appropriate-response-time-to-email>

² Arise. (2019, February 25). Customer Service Frustrations: Email Response Times. Retrieved June 5, 2020, from <http://www.arise.com/resources/blog/customer-service-frustrations-series-email-response-times>

³ Thorne, B. (2015, July 25). How Decision Fatigue Makes You Work Worse When You Work More. Retrieved June 5, 2020, from <http://blog.idonethis.com/decision-fatigue/>

⁴ Tierney, J. (2011, August 17). Do You Suffer From Decision Fatigue? Retrieved June 5, 2020, from <http://www.nytimes.com/2011/08/21/magazine/do-you-suffer-from-decision-fatigue.html>

At first, these tags will catch a limited number of messages, and the remainder of messages will have to be sorted manually. Over time, your team will be able to tweak the priority tags with additional keywords or triggers to sort more of your messages automatically. Team members can then work through customer questions with the right level of urgency — so even in high-volume periods, you can feel confident urgent messages are being addressed quickly.

3. Resolution time

This metric tells you how long each team-mate takes to resolve an issue. Resolution time is a great indicator of how long it's taking your team to help the customer achieve their goals. If resolution times are long, it could be a sign that your team is lacking the resources or expertise required to find answers quickly.

If the majority of conversations are taking a long time (perhaps compared to a baseline benchmark) to resolve, you're probably getting caught up with complex issues that require quite a lot of investigation. Maybe you're responsible for too broad of a range of questions, so you never have the opportunity to gain expertise in a particular area.

Introducing specialization on your team can dramatically improve resolution time. So if you have a team of pricing experts, they can automatically get routed messages with "pricing" in the body. If you're a software company with a variety of offerings, you can have support teams focus on particular tool sets or use cases. Messages can be assigned to each team or each individual according to their specific expertise, so they can make the most of their deeper working knowledge to fix complex problems.

4. Right medium

Like Marshall McLuhan famously said, "The medium is the message." He was talking about how the channels and methodologies we use to communicate as much information as the message itself — and can even inform or alter the message as well.

These days, we have all kinds of media at our fingertips to communicate with customers, and which one you choose for each message will change how your customer receives it and understands it. We need to be just as deliberate with the text of our message as we are with the context, or in other words, the channel.

There are thousands of channels you can use, but to make it simple, we're going to sort them into three buckets: email, messages, and meetings. A "message" can be anything from a text to live chat to Slack or WhatsApp and the like. A "meeting" could be a phone call or a video chat or a face-to-face interaction.

A good framework to follow in deciding which to use is to think about three things:

- 1) the speed of the response you need,
- 2) the type of idea you're sharing, and
- 3) the response you expect to come from it.

Speed: instant or asynchronous?

- Do I need a response right this second, or can this conversation be handled on the recipient's own schedule?

Idea: informative or reactive?

- Is this an FYI where the recipient can give a quick and move on? Or is this idea something that needs to be responded to?

Response: short answer, lengthy answer, or discussion?

- What do I expect to come from this? Will the answer be in the form of a succinct answer, something a little longer, or is the result going to be a back-and-forth discussion?

When you reach out to your customer, think about how you'd like them to respond. And when they reach out to you, it's always best to respond at first in the same channel they chose, and switch channels as necessary.

	Message	Email	Meeting
Speed	Instant	Asynchronous	Instant or asynchronous
Idea	Informative	Reactive	Reactive
Response	Short	Lengthy	Discussion

CHAPTER 2:

The importance of customer experience

Earlier, we talked about how customer communication is a dialogue, not one-way. This sounds intuitive, but it's also where too many companies fall short. They don't listen — or they listen, but they don't hear.

In this chapter, we'll take a quick look at why listening, taking action, and following up are so important to customer experience, and establish a framework to operationalize them. But first, a quick rundown of some facts to set the stage:

- Oracle research shows that 89% of consumers began doing business with a competitor following a poor customer experience.¹
- HubSpot found that 42% of companies they surveyed don't collect surveys or feedback of any kind.²
- Gartner data shows a drop-off of 50 percentage points between companies who collect feedback and companies that even alert internal staff members of the results.³

Does that seem right to you?

If customer experience matters so much that almost 9 out of 10 people are switching to competitors after a bad interaction, why are so few companies listening to their customers about it? And why are even fewer actually making changes?

“Before you can learn how to speak, you need to practice how to listen.”

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¹ Oracle Corporation. (2012). 2011 Customer Experience Impact Report. Retrieved June 5, 2020, from <http://www.oracle.com/us/products/applications/cust-expim-report-report-epss-1560493.pdf>

² Andrews, M. (2019, June 11). 42% of Companies Don't Listen to their Customers. Yikes. [New Service Data]. Retrieved June 5, 2020, from <https://blog.hubspot.com/service/state-of-service-2019-customer-first>

³ Thompson, E., & Davies, J. (2008, December 3). Customer Experience Management: Raising Customer Satisfaction, Loyalty and Advocacy. Retrieved June 5, 2020, from https://www.gartner.com/it/content/776100/776114/3dec08_customerexperiencewebinar.pdf

⁴ Bernstein, S. (2014, January 10). CX & Customer Success resources. Retrieved June 5, 2020, from <https://waypointgroup.org/surveys-without-action-do-more-harm-than-good/>

(Another) four-part framework for customer communication

We love chopping strategies up into four parts! In this case, our four-part methodology is all about ensuring consistently great customer experiences across your company.

1. Listen

Before you can learn how to speak, you need to practice how to listen. By the time your customer writes a bad review or cancels their subscription, you've already missed your chance to listen. They're talking to you constantly, but are you paying attention? And in addition to listening to those passive signals, are you reaching out proactively to get feedback?

What does that look like in practice?

Passive listening: Your clients are constantly sending signals, whether either of you knows it or not. The number of emails and support requests your customers send (or don't send) is a signal. The time it takes them to respond to your messages is a signal. Whether they respond at all is a signal! Taken all together, they can paint a picture of a frustrated cus-

tomers, an engaged customer, or a customer on their way out the door. Passive feedback is never a complete picture, but it's always a critical perspective. Are you measuring it?

Active listening: Most people associate this tactic with surveys, and those are an important part of active listening. Very few customers reach out proactively to offer up valuable insights, but you'd be surprised how many are ready and willing to give them to you if you just ask. Pro-tip: You can dramatically improve response rates to feedback requests by tying them to milestones or achievements — like support interactions, renewals, trainings, etc.

2. Take action

Warning! Don't ask for feedback if you don't have intention, capacity, and a plan to take action on it — whatever that feedback may be. Companies that send surveys but don't act actually hurt their customer relationships.⁴

The number-one obstacle to having that capacity is organizational silos.

Let's say you're a customer success manager. You finish an onboarding session and follow-up with a quick email asking how effective it was. The customer loved your training, but was frustrated with one of the UI elements of the software product. If you have no way of getting that feedback to your product team — and more importantly, making the improvements the customer requested — it's actively hurting your customer relationship, because asking for that input comes with the expectation that it matters.

When the feedback is directly pertinent to you alone, it's easy to make changes. But when you need to involve other teams, it's tougher. Many companies haven't exercised that muscle. Do you have an internal workflow to share feedback across teams? Let's go a step further. Do you have processes to assign and ensure that feedback gets acted on? And going one step further: Do you have processes to know when it's been acted on to then be able to reach out and let the customer know?

3. Listen again, act again

Too many companies skip this step, but it's so important. And it's an opportunity for your passive listening to complement your active listening. When you make those changes based on customer feedback, can you see improvement in their experience? When you

reach out to them with what you did, are they satisfied?

This is what we mean when we talk about an ongoing dialogue. As long as they're your customer — and even after they're not — this conversation shouldn't stop until the customer chooses to end it. You have a responsibility to not be totally annoying, so establish a reasonable cadence. You can even ask the customer how and how often they want to give this feedback.

BUT! Only if you do what they ask, and then...

Repeat. Repeat. Repeat.

4. Report back

Finally, you need to take a look at the overall process and report back to your customer and your internal stakeholders how and what you did. Did it make a difference? If so, what? What can be improved in the future?

If you listen and act but you don't tell the customer and you don't measure the effects, what difference did it all make?

Best-in-class companies are closely tracking their customer communications with analytics to correlate to results. And those same companies always close the loop on feedback with their customers.

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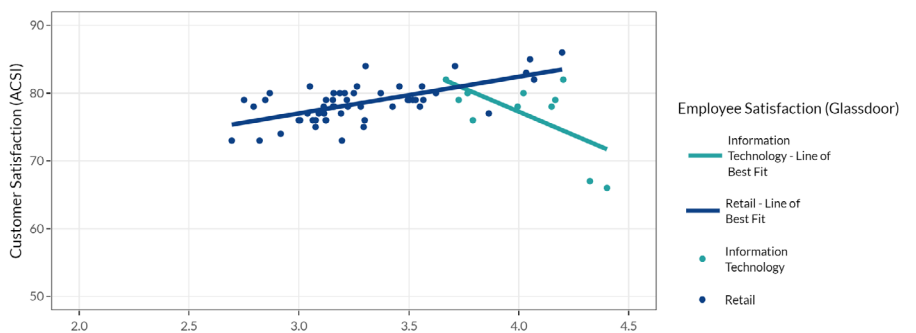
¹ Zhao, D., & Chamberlain, A. (2019, December 20). The Link Between Glassdoor Reviews and Customer Satisfaction. Retrieved September 21, 2020, from <https://www.glassdoor.com/research/employee-customer-satisfaction/>

CHAPTER 3:

Company-wide customer communication

Glassdoor recently collected and published data that strongly correlated internal company culture and employee happiness to positive customer experience.¹

But there was some nuance to that correlation. For example, when you broke it down by industry or vertical, not every type of company's great culture had the same correlation.



“ The impact customer experience has on revenue should also cement company culture as a growth driver. ”

Companies in the service and retail industries had strong positive correlation. If they have happy employees, that happiness is reflected in customer happiness. In contrast, the information technology industry had weak – and even negative correlation. LinkedIn and Facebook (the two outlier dots on the bottom right) have very high employee satisfaction, but relatively low customer satisfaction.

Why is that?

Glassdoor’s hypothesis was that the greater the level of personal interaction between those high-satisfaction employees with customers, the more impact they make on customer satisfaction. It’s the transitive theory of customer satisfaction, in a way.

You can use Facebook and LinkedIn every day for your entire life without personally interacting with a Facebook or LinkedIn employee.

But what if Facebook and LinkedIn would interact with their customers personally? What if they could connect their highly satisfied employees to their customers? Could tech companies make a greater impact on their customers?

Every role is a CX role

In business, we get too caught up in our own departments and roles. We lose sight of the impact we’re already making – and the even greater impact we could be making.

If you’re on your company’s people or human resources team, you probably don’t interact with customers a lot. In fact, you might even think you have no direct impact at all on the customer-facing side of your business, so why should you care about customer communication?

The data from Glassdoor should put the idea to rest that HR professionals don’t impact customers directly. And the impact customer experience has on revenue should also cement company culture as a growth driver. How can you leverage it more? How can people teams proactively get their most satisfied employees more face time with their customers?

And people/HR isn’t the only traditionally internal-facing role that benefits from more

customer interaction. Every team member can and should be connecting and communicating with customers. At SurveyMonkey, every single employee is required to survey a customer. Here at Front, we’re consistently sharing customer feedback internally – whether that’s through virtual fireside chats or sharing clips of real customer conversations at company-wide meetings.

It’s simple, but not easy.

3 Challenges of company-wide customer communication

Remember how we said that the more moving pieces you add the more difficult and complex customer communication becomes? Right, so why are we advocating for getting your entire company involved?

And it’s true, this strategy could have a big payoff, but it also comes fraught with operational challenges. Let’s look at three of them.

1. Dropped balls: Forgive the sports metaphor, but the more you pass the ball back and forth, the more chances there are to drop it. These hand-offs will always be the most delicate time in your customer communication process. Sales to customer success. Success to support. Support to account management. The customer loses track of who they’re talking to about what. The vendor loses track of important information. The longer the game of telephone gets, the harder it is to understand what you’re talking about.

How to solve it: Get all your teammates on the same communication system. If all sales communications are only accessible in the CRM, that knowledge is closed off from the support team. If all support is happening in a help desk, no one else can get that critical information.

2. Lost context: From the customer’s perspective, a company is all one entity. Few things are more frustrating than having to explain your problem again and again to person after person as you get passed around on the phone or forwarded all over the office. Obviously a vendor could be made up of many people, but you need to

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“Stop using tickets! Customers would much rather have a personal response than be treated as a number.”

Speak with one voice. And that means having one collective memory across all teams and teammates.

How to solve it: Preserve all conversation history across all channels in a single database that’s transparent and easily accessible across teams. Whenever you communicate with a customer, make sure you’ve glanced through the history of the relationship so you can preserve the continuity of the conversation.

3. No clear point of contact: When everyone “owns” the customer experience, no one does. At least that’s the pitfall of this type of distributed responsibility. It can lead to slow response times as no one feels the urgency to respond to things outside their clear lane. It means that no one person or team owns the complete context of the relationship — no one has the clear perspective brought about by a comprehensive view.

How to solve it: Create a clear process and criteria for ownership over inbound and outbound communications. Hold each team accountable by tracking communication metrics and building OKRs (objectives and key results) around them. Create a single source of truth for your customer communications.

Operations teams

For ops professionals, fragmentation presents the biggest challenge to a well-oiled customer communication machine. Each team has their own set of tools and few of them work well with each other. The single source of truth, the single pane of glass — they’re just out of reach.

Quick tip: You don’t have to force all your teams off their beloved technology stacks. You already have a universal standard that can bridge them all together. Look at how you’re already talking to customers — say, email — and see how you can build the functionality you need onto it.

Support teams

Support as a function is budgeted for most companies as a cost center (more specifically, a “Cost of Goods Sold” — COGS). If you want to grow, you cut COGS and increase revenue. That means support is in a constant battle to do more with less — to go faster and do better with fewer resources. That means support is constantly making sacrifices to automate through a help desk, move to self-service, or outsource to a community, making customers search or ask for answers from each other.

Quick tip: Stop using tickets! Customers would much rather have a personal response than be treated as a number.¹ Even a Twitter interaction that doesn’t resolve the issue is more satisfying for customers than being in a support queue, because it’s personal. 75% surveyed in this 2,000 consumer study said they would rather wait twice as long to talk to a human rather than deal with a [chatbot](#). Operationalize and scale your human-to-human channels instead.

Customer success teams

CSMs (customer success managers) are at the fulcrum point of all these teams. They’re tagged in post-sale, they’re working closely with support, they’re building towards renewal and expansion. They create continuity across the lifecycle. That means they need systems and processes to preserve that continuity at every milestone.

Quick tip: Simplify hand-offs between teams and keep a clear, transparent, and accessible record of all customer interactions.

Customer communication for functional teams

Let’s take a closer look at a few teams specifically, and one quick tip they can use to communicate better.

Sales teams

Sales reps, account managers, business development — they make or miss their number based on process and context. That’s why CRM (customer relationship management) has revolutionized the profession. Modern sales professionals live in their CRM every minute they’re at work. But most of the actual communication is happening in a different place — email, text messages, phone calls.

Quick tip: Consolidate your customer communication channels together with your CRM so you can see message content alongside data.

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¹ Terlep, S. (2019, August 03). Everyone Hates Customer Service. This Is Why. Retrieved June 5, 2020, from <https://www.wsj.com/articles/everyone-hates-customer-service-this-is-why-11564804882>

CHAPTER 4:

Customer communication technology

By now you've probably got the picture: it's going to take some level of technology to really do this customer communication thing right.

At its core, it's a problem of impact. How can you make a greater impact on your customer relationships? This problem requires an impact solution.

Here's how we think about it:

$$\text{Impact} = (\text{Work} - \text{Effort}) \times (\text{Scale} - \text{Sacrifice})$$

In other words, you want to accomplish more with less effort. You want to accelerate without making trade-offs. Now we're in the province of tech.

And there really are a million or more ways to approach the issue from an IT or engineering perspective, but this chapter will lay out an effective framework to guide you on that journey.

Let's start with three core premises based on what we've already talked about for understanding what your customer communication technology needs to do.

1. Customer communication is a company-wide effort.
2. Every customer message in every channel must be actionable.
3. All customer messages must be able to be viewed and controlled centrally.

Fair warning:

We do want to set clear and honest expectations in this chapter. Front is a customer communication platform. We have a strong point of view that Front is not only the best technology on the market to accomplish this mission, but it's the only one currently capable of accomplishing it in full. That said, it is possible to put together a stack of point solutions or build in-house something similar that could accomplish your company's goals. The rest of this guide has a point of view in line with our biases. That said, we want to do our best to deliver an accurate and helpful set of criteria that we hope can help you out whether you choose Front or not. Here we go!

The limits of communication technology

Chances are high you already have several — if not dozens — of tools that are already helping you communicate with your customers. But assessed all together, you've probably noticed their limits already. Let's run through a few:

Help desk: Ticketing can often feel impersonal. Customers are assigned numbers, processed and resolved. It can feel dehumanizing and frustrating, and it's often just as clunky internally as it is for the customer. Their issues may be resolved, but the experience is isolated from their larger customer journey.

Chat bots: Chat bots can feel fun and quirky. They can be programmed to mimic

humans really well, but they're robots. They have a limited set of possibilities and require human intervention past a certain level of interaction.

Marketing automation: You can scale this channel infinitely, but it only works one way. Inbound replies come through email, which wasn't built for "many-to-one" communication.

Email: Email was built for one-to-one messaging, and has been adapted over the decades to suit a wide variety of uses, but it's still limited by those constraints.

Slack, Teams, etc.: These tools are becoming more widespread, but they're far from

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“Context switching is leading to an increase in stress.”

universal, which makes them highly effective for internal communication and limited for customer communication. Plus, you’ll always have email, so no matter what, you’re adding separate communications channels. That means context switching!

CRM: Most CRM technology includes different methods and standards for external messaging, but they’re inconsistent and siloed in the platform. That makes them harder for company-wide use.

But if you put them all together, you’re able to meet many of the challenges we’ve already talked about. Unfortunately, the mix and match method does come with its own set of headaches:

Task switching: The point of having all your work in one window isn’t just about personal preference or saving a few clicks here and there. Context switching is a much more serious issue than aesthetics or ergonomics. It’s about stress. Our survey of over 2,000 workers found that context switching is

leading to an increase in stress.¹ Constant messaging from an increasing variety of channels is making us measurably unhappy. That’s the best possible reason to make a change, but if you want a growth argument, see chapter 3 above!

Lack of cohesion: When you have a specific, limited problem, a point solution is best. But when you have a strategic goal that touches every message your company sends and every relationship in your customer base, you need to think of the whole picture.

Data access and integration: The beauty of the “single pane of glass” idea of information is again, less about the aesthetics of it all and more about the data itself. Your data needs to play nice with the software it moves in and out of. It needs to be comprehensible in a variety of applications. Different standards for that data mean different challenges for your data team. Consolidation is best — especially when you have a flexible, adaptable platform to unify it.

A checklist for your customer communication platform

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When you audit your own customer communications systems or shop for a new one, use this checklist to ensure you get what you need:

Total company context: Everyone at your company can know everything about a customer quickly and easily. No more silos caused by lack of a universal tool.

Company level insights: Which customers are the most needy across your customer-facing teams? Which customers did you interact with across your human and scaled channels? And can you get proactive insights about the people you didn’t interact with?

Company level workflows: Can you escalate a customer communication across your various teams? Can you route messages automatically across teams? And can you make decisions at a company level?

Company-wide communication: Can everyone in your company collaborate and participate in customer communications easily?

Smooth hand-offs across the customer journey: Can you seamlessly hand off a customer to another team? Can you quickly loop in cross-functional internal stakeholders without swapping tools or filing a ticket?

Ability to action on any piece of communication: Can anyone (given the right permissions) respond to any piece of communication on any channel? Or are some users and conversations view-only to teams that need to take action?

Centralized control and visibility over outbound customer communications: Can all your teams adhere to global do-not-contact rules? What about at-risk customers? Can sales or account managers block marketing emails to hot leads or trial customers in favor of fully personalized messaging? Can CSMs respond directly to inbound support requests for VIP accounts?

¹Hackeling, E. (2020, August 07). Context Switching In The Workplace and Constant Interruption. Retrieved June 5, 2020, from <https://frontapp.com/blog/context-switching>

CHAPTER 5:

Why Front?

Front checks all the boxes.

That’s probably not surprising since we wrote the boxes, but in fairness, we started with the boxes and built the product to check them — because that’s what we need to communicate with our customers. And it’s what our customers need to succeed in their relationships as well.

Stronger customer relationships boils down to good communication.

Other companies had pieces of the puzzle, but our mission was different. Customer communication is too big for point solutions. We had something equally big in mind. And we can break it out into (you guessed it) four main solutions:

1. Intelligent focus

2. Work together

3. Effortless visibility

4. Context at your fingertips

Let’s go through them one by one:

Intelligent focus

When we talked to companies, we found that the sheer volume of messages and the effort it takes to manage them, sort them, respond to them, and take action on them could be crippling. That’s not new stuff — software solutions that try to hack productivity are a dime a dozen. But we didn’t want to “outsource” the diligent relationship-building and thoughtful design that goes into customer communication strategy. We wanted to take the effort out of it — so you can focus on what really matters.

It turns out that a big part of the day-to-day business of communicating with customers was what we call “busywork.” The stuff that takes a long time to get a little bit done and leaves you feeling burnt out. We set out to automate all of that stuff without automating the humanity out of communication.

Here’s what that looks like in practice:

Rules: Front helps you build automatic workflows to sort new messages, route them to the right person, and respond on time.

Canned responses: In Front, you can save common messages to automate the tedious stuff while you quickly and easily customize the parts that have the most impact.

Assignments: In order to solve the “if everyone owns it, no one does” conundrum, we made a way to get clear accountability with a designated owner for every message.

Snooze: Some messages can wait! Save them for later without forgetting to follow up.

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Work together

We also saw that people were trying to do it on their own. Power through their own message queue. Reply to everything on their own. Dig through their inbox by themselves. But the key to human communication at scale is doing it as a team. It takes a village to nurture a customer base, so we made it easy to work together with your immediate team and with everyone in your company. Here's how:

Commenting: If you're looking for efficiencies, we should all agree that forwarding and copying is kind of lame. We made a way to just @mention any teammate directly within an email thread so you can share information and chat about it internally, in context, without having to duplicate the thread in a million places.

Shared drafts: You can collaborate on shared documents in Dropbox Paper or Google Docs. Why not an email? In Front, you can edit a draft of a message with your teammates in real time so you can get back to customers faster.

Team inboxes: In Front, you have your own personal inbox and you also have a team inbox. Team inboxes are transparent and visible to your whole team. There's a single shared copy of every message, so anyone can take action — or see what actions have already been taken.

Effortless visibility

We need to talk about information silos. Every team has different goals, strategies, specialties, and key metrics. But when you try to do customer communication the right way, as a cohesive team, those silos just get in the way.

How can you get different teams to communicate together in harmony without messing up their internal processes? It all starts with visibility. For most companies, it's just too hard and too complicated to share communication information internally. So here's what we built:

Team inboxes: When your team inbox is transparent to everyone, data and context is freely accessible across teams. Think of all the information stored in your inbox. What if everyone on your team could search through it as easily as you?

Discussions: Do you spend a lot of time switching between windows to send a Slack or instant message to your team about an email? All your work communication should happen in one place — that doesn't mean every type of message is the same. Front has synchronous discussions built in to go along with asynchronous emails and conversations.

Assignments: Front is the single source of truth for your company's customer communications. Every message gets a clear owner to keep projects moving to completion.

Analytics: Getting better starts with measuring. It's tough to improve your response time or reduce your inbox bloat without knowing exactly how fast you're going or how many messages you're getting. So Front comes with Analytics built in. Get insight into team, individual, and customer messaging so you can make confident, informed decisions.

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Context at your fingertips

As cool as Front is, it's never going to be the only technology you use at your company. We don't want to replace the stuff you love and rely on — we just want to make them work better together for you and your customers. So we made Front to play nice with other software.

For example, we saw people were stressing out about switching back and forth between email and their CRM. You need that information right in front of you to send and respond to messages. But you shouldn't have to spend so much time task switching. It's just a no-brainer that CRM should live right next to your inbox. And that's just the beginning — take a look:

Integrations: Inside Front, you can access Salesforce, Asana, and 90+ apps directly from your inbox to stop context switching and keep data in sync.

API customization: You can also connect your homegrown customer database and tools you rely on to access the information your business needs to thrive.

Universal inbox: Say goodbye to tab overload! All your teammates, messages, and apps can live in one Front window.

Channels in team inboxes: Whether it's social media messages, live chats, email, or any other messages, you can manage them all with your team in one view/place.

“The heart of our customers' business is the heart of our business.”

Try Front out for yourself

Front is a big platform. There's a lot it can do. It was created to solve a really big problem that either encompasses or intersects with almost everything you do at work on a day-to-day basis. But don't let that make you think it's inaccessible. Front is actually lightweight, intuitive, and simple to configure. You can try Front for yourself today or schedule a quick demo to get a guided tour.

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Scale customer experience with a human touch

Get started

