



Client Heartbeat

# The Secrets To High Customer Satisfaction

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eBook

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# Why You Should Read This Book?

## **1. What and why you need to track customer satisfaction**

What is customer satisfaction? We give you the run down of exactly why you need to track customer satisfaction with five benefits your business can get out of it.

## **2. How to track customer satisfaction**

Tracking customer satisfaction is often a headache. We give actionable strategies you can use to start tracking customer satisfaction today, so you can stop them leaving tomorrow.

## **3. How to create a customer experience that delivers high customer satisfaction and creates customer advocates**

Creating amazing experiences is the key to high customer satisfaction. We take you through over 50 strategies to increase satisfaction, reduce customer churn and build 'sticky' loyalty.

## **4. How to leverage customer advocates to generate new business referrals**

Customer advocates are the number one source for growing your business. Learn how to identify your advocates and build relationships with them so they refer you new business.

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# What And Why You Need To Track Customer Satisfaction

## What Is Customer Satisfaction And Its Role In Your Company

In a world where customer acquisition costs are 4-5 times more than the costs of retaining customers, companies need to focus on improving customer satisfaction and keeping customers happy.

[Qualtrics](#) defines customer satisfaction as one of the most essential elements of customer retention, customer loyalty, and product repurchase. The art and science of customer satisfaction involves strategically focusing on creating and reinforcing pleasurable experiences.

Customer satisfaction is a key indicator as to the level of customer service. Client Heartbeat surveyed over 200 companies and their customers to identify trends in customer satisfaction. This eBook aims to address these trends to help you increase customer satisfaction so you can retain more customers and boost customer lifetime value.

# Why You Need To Track Customer Satisfaction

[Harris Interactive](#) conducted their latest Customer Experience survey and found 86% of customers quit doing business with a company because of a bad customer experience.

A poor customer experience can lead to your customers cancelling their contracts and taking their business elsewhere.

It's no longer good enough to just send customer surveys and get feedback. IT Companies need to monitor changes in satisfaction so they know which customers are happy and which are 'at risk'.

**Gordon Tan, Director – Client Heartbeat & R&G Technologies**



Five reasons why you need to track customer satisfaction.

## 1. You have high marketing costs

[R&G Technologies](#), an IT Company in Brisbane, budgets \$300 per lead and converts one in five, so just there you're looking at \$1200 marketing costs, and that doesn't include the time of the company's business development managers!

## **2. A lot can go wrong during the lifetime of a contract**

As different problems arise and different employees handle customer inquiries, your customer will be receiving numerous customer experiences. With no customer satisfaction tracking, you are going it blind and don't know how your customers really feel about your service. Yeah, they may love Jimmy when he comes out, but what about Tom – do they like his service? Could his poor service be a potential reason for a customer to leave?

## **3. Happy customers refer new business**

By ensuring your customers are satisfied, you are putting yourself in the best possible position to create customer advocates that will send you business referrals. One thing that R&G encourages all staff to do is go into every encounter with a customer as if they were going to ask for a business referral at the end. By taking this approach, they are on top of their game, offering outstanding service and striving to exceed customer expectations.

## **4. Our statistics show a drop in customer satisfaction is a key indicator that the customer has a foot out the door and is looking at competitors**

Client Heartbeat works with companies around the world to track customer satisfaction and has developed a unique algorithm that looks at a customer's past satisfactory scores, combines it with industry data to identify unhappy customers before they leave. This system has proved an essential component for companies and has shown that a drop in customer

satisfaction is the first sign a customer is unhappy with the level of service, and starts questioning their loyalty which leads to them evaluating competitors.

## **5. Customers defect to competitors based on perceived value**

Research by SBA found that 9% of customers will leave because they perceive a competitors offering as better. Annie Miner from The Dunvegan Group believes that to stop this, companies must focus on offering a 'perceived service' that is better than competitors. Tracking customer satisfaction and then benchmarking it against others in your industry will help you discover how you stack up against the rest and see if you are at risk of customers potentially defecting to competitors.

# The Business Case For Tracking Customer Satisfaction

Here are six benefits a company can get from tracking customer satisfaction:

1. **Assists with identifying 'at risk' customers** who are unhappy with your service and potentially going to cancel.
2. **Assists with finding happy customers** who become your advocates that can drive new business referrals and grow your business.
3. **Enables you to identify trends** in your customer service on an individual level so you can make better business decisions to improve the overall customer experience
4. **Lets you identify common problems** that are happening over and over again. Use this intelligence to proactively prevent problems happening again which leads to a better experience for customers.
5. **Lets you hold employees accountable** for the level of service they are delivering. This extra level of data can form employee KPI's and makes customer satisfaction measurable.
6. **Encourages a 'customer-first' culture** within your company. A culture that embodies customer service can actually form a strong competitive advantage.

# Some thoughts from SurveyMonkey on why to track Customer Satisfaction

A consumer survey will help you pin down your customers' likes, dislikes, and the areas of improvement that exist. For example, what does the average customer think about your prices?

Too high? Just right? How well is your staff doing on customer service, or how well does your customer success team understand the growing needs of your customers—and prospects? Is there anything at all about the customer experience that turns off your users?

You might even send out a survey to figure out why customers stop doing business with you, how you might win them back, and how you can prevent customer losses in the future. Empower your employees to meet milestones based on customer needs.

And, if you're developing a new product or updating an existing one, customers can provide you with invaluable feedback about design and functionality. Oftentimes, users will shed light on problems that would have otherwise been missed.

# How to Track Customer Satisfaction and Identify Unhappy Customers

Now that you understand what customer satisfaction is and why it is important to track it inside your company, let's discuss *how you can actually do just that*.

## Using Customer Surveys To Track Satisfaction

Surveying your customers is the best way to get actionable customer feedback that you can use to track customer satisfaction. Customer surveys can be conducted online via online surveys and feedback forms, or offline via in person and over the phone interviews.

Traditionally, the biggest challenges you will come across when doing customer surveys is getting customers to actually fill out the surveys. Let's face it, your customers live busy lives and not all have the time to fill out customer surveys.

### 3 Tips From SurveyMonkey For Creating Winning Customer Surveys

Go. Fight. Win. Well, maybe it's more like: Ask, Listen, and Win. In addition to using methodologically-sound questions in the key areas already mentioned, you'll also want to follow these tips for creating a great survey:

**1. Be clear.** Say you're surveying on customer satisfaction for a hotel stay. Don't make your respondents guess what you mean. Tell them. Ask if the room service was prompt, if the swimming pool was clean, if the check-in clerk was friendly, if their bed was comfortable, and so on.

**2. Be specific.** Don't ask questions about general concepts or ideas; ask about specific concepts or ideas (i.e. being "a good person" is general; being "polite to waiters" is specific). A question that focuses on a specific concept is known as a "construct-specific" question ("construct" is really just a fancy word for concept).

**3. Ask a lot of questions.** Asking multiple specific questions instead of one general question will not only make your questions easier to answer for your respondents, but it will also make your data easier to analyze and act on. Did your waiter let you know about the specials of the day? Did he take our order promptly? Was he able to answer all of your questions? Was he able to coordinate the timing of your courses?

Source: [SurveyMonkey](#)

# Secrets To Creating A Kick-ass Customer Satisfaction Survey

Your customers are drowning in an ocean of lousily designed customer surveys. This has led to companies experiencing very poor survey response rates and getting no customer feedback to act on. If you want actionable insight into your customer satisfaction levels, what you need to do is design a customer survey that gets high quality responses.

The goal of any customer survey is to get meaningful, high-quality responses in order to wholly comprehend your customer's sentiments towards you, and how you can shift their attitudes.

There are six factors you need to think about when designing a 'kickass' customer survey. You need to brand your survey, make it accessible, limit the length, write an objective, keep it personal and track your feedback.

Join me for a glimpse of each factor.

## 1. Brand your survey

Consumers are naturally suspicious of non-branded goods. Likewise, they'll be suspicious of your survey if there is no recognizable branding on it. For example, if you had a migraine and found a box with the word 'Panadol' scribbled across it in blue ballpoint, would you use the pills inside? Unless you're two-years-old, it's a safe bet you wouldn't dare. If you don't trust

the packaging, you won't use the product. In like manner, customers won't engage with your survey unless it's endorsed by you.

People respond to a non-branded survey the way you respond when a complete stranger asks you a question. You don't care, because you won't see them again. You should exploit your pre-existing relationship, display business logos, colors, high quality graphics and well written text. Remember if your customers know who you are, they'll try harder to answer honestly and constructively. You'll get meaningful, accurate data you can use to improve your business's customer satisfaction levels.

## **2. Make your survey accessible**

When a customer fills out a customer survey, they are doing you a favor. In order to get the highest possible number of customers completing your survey, you need to streamline the process as much as humanly possible. This means designing your survey around your customer's needs so you get responses from a [representative sample](#).

Make it accessible by emailing it directly to their Inbox, and make your survey 'responsive', so it is [compatible on mobile and tablet devices](#). These days, nearly everyone on a lunch break is on their phone, perusing the Internet out of sheer boredom. Give your customers access by creating a customer survey, which can be submitted via mobile. Just as how you're more likely to reach for that second doughnut if you can see it, your customers will be more likely to complete your survey if you make it easy for them.

### 3. Keep your survey short

Short means not exceeding ten questions and sticking to [one page on a 1024 x 768 screen resolution](#). I know this design sounds scarily minimalistic, but here are the reasons why it's a good idea:

- [Eighty four per cent of people don't read information on the web](#), they scan it. Customers don't read the questions properly when the survey drags on.
- If there are too many questions, your customers won't attend to each question thoughtfully. Instead, they'll rush through looking for the finish line.
- Tonnes of questions complicate your analysis. Asking the same question in four different ways creates an unnecessary amount of work for your business.

Another recommendation is keeping answers options simple. A rating scale is best because it's quick and easy. Not only do text boxes make your survey look time-consuming, they're also difficult to analyze because they're often typo-ridden and unquantifiable.

The other **BIG benefit** of using a rating scale on each question is you will make your life a lot easier when it comes round to analyzing the customer data, identifying trends in the data and finding unhappy customers.

The screenshot shows a survey interface for 'Hi Saxon'. At the top, there is a grey bar with three dots on the left. Below it, a green logo consisting of two overlapping diamonds is centered. To the right of the logo, a clock icon is followed by the text 'Your last survey was on the 25th August 2012'. Below the logo, the text 'Hi Saxon,' is displayed in a large font, followed by 'We appreciate your feedback and would love to hear what you think.' in a smaller font. The survey consists of three sections: 'Promptness', 'Accuracy', and 'Helpfulness'. Each section has a title, a question, and a rating scale from 1 to 10. The 'Promptness' section asks 'How happy are you with the speed & efficiency at which we are able to respond to your requests?' and shows a rating of 7. The 'Accuracy' and 'Helpfulness' sections show previous ratings of 10.

Hi Saxon,  
We appreciate your feedback and would love to hear what you think.

**Promptness** ————— You previously rated us a **10**

How happy are you with the speed & efficiency at which we are able to respond to your requests?

1 2 3 4 5 6 **7** 8 9 10

**Accuracy** ————— You previously rated us a **10**

**Helpfulness** ————— You previously rated us a **10**

*Example of a Rating Scale used inside Client Heartbeat Surveys*

No one likes completing surveys. Make it as painless as possible for your customer, and they'll pay you back with a high volume of quality responses you can use to enhance your business's customer satisfaction.

#### 4. Make your objective explicit

When you ask customers to complete a customer survey, you're giving them the power to enact change within your company. People enjoy empowerment, so let them know.

At the start of your survey, display one or two sentences explaining what you would like the customer to do and why.

*'We want you to fill out our feedback survey, so we can give you better customer service.'*

The peculiar reality is most customers don't realize a customer survey gives them a voice to express their deepest disappointments and desires.

Explicitly remind your customers you want to give better customer service based on their feedback, and your customers will respond with enthusiasm. In addition, [knowing your own objective helps you organize your questions toward a specific outcome](#). If customers see and sense your purpose, they'll see the survey as a worthwhile exercise, and not only will they respond, they'll respond well.

#### 5. Personalize your survey

The argument for anonymous surveys is this: When dealing with a sensitive or intimate issue, anonymous surveys are more likely to produce a higher response rate, and more honest, frank responses. I'd argue given the amount of public flaming and shaming of businesses that goes on in social media, I don't think honesty is going to be a problem. Let me debunk

these myths surrounding anonymous surveys with a few statistics and some good old-fashioned common sense.

My trawl of online literature revealed a [whopping one per cent difference](#) between the response rate for anonymous and personalized surveys. Think about whether you're more likely to respond when someone calls you by name, or by a generic title. In terms of honesty, how much more truthful do you have to be, when you're accountable to your response? [Other studies have found participants slack off](#) when they know they can't be identified. Not only is your response rate largely unaffected by personalization, you avoid fake responses, and only hear from your customererele.

Personalizing your survey is like personalizing a huge, glass paperweight for someone's birthday. No matter how much they want to give it back, they'll still take it because you took the time and effort to personalize it especially for them.

## **6. Design your survey so it can be released every given period**

Design your customer survey so it can be released every given period. A given period can mean quarterly, yearly or anything you wish. After a few releases, the survey will be integrated into your customers' routine, giving you omnipresence over your business's customer satisfaction levels over time.

You'll be witness to shifts in your customer sentiments and be able to make informed decisions about renewing, replacing or maintaining certain services. You'll also be able to

identify the exact point in time when the change occurred, and rectify mistakes or build upon what you're doing well. Best of all, you'll be able to recognize trends and take proactive action if a customer is dissatisfied with your service.

The effort required to release a feedback survey regularly pales in comparison to the potential gains of doing so. Not only will your current feedback be analyzed against a historical backdrop, your investment in the past won't be wasted because none of the old information becomes obsolete.

### **Well executed customer surveys yield more actionable insights**

Writing any old questionnaire is easy. Designing an effective customer survey, which gives you actionable insight into your customer satisfaction levels, requires careful consideration of the six factors we briefly delved into.

You now understand how branding, accessibility, limiting the length, having a solid objective, personalization and tracking your data impact upon the quality and quantity of responses you receive from your customer survey.

Implement these ideas now to make your customer survey the best tool you've ever had for increasing customer satisfaction and reducing customer churn.

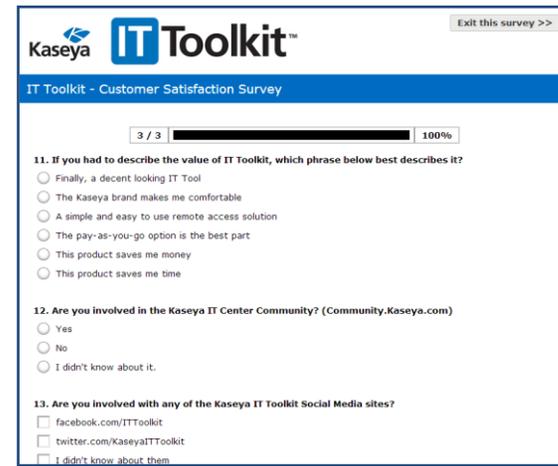
# 3 Real Life Customer Surveys from Companies With Critiques

## 1. Kaseya (<http://www.surveymonkey.com/s/BLVFFMP>)

Kaseya are using SurveyMonkey to facilitate their customer satisfaction survey. Initial impressions are the survey is nice looking, includes the companies branding and is reasonably clear.

Here are my recommendations:

- **Survey length is too long.** Just from the first page I can see five questions and that's only 33% (there's actually 17 questions in total with a lot of these questions being five part questions! Massive!). Our research at Client Heartbeat indicates keeping questions down below 10 to ensure optimal survey response rates.
- **No clear objective.** Although the survey does say, 'customer satisfaction survey' – there is no context around what this is. Yes, we get you want my customer feedback, but why? and what are you going to do with it? It's important to make your survey



The screenshot shows a SurveyMonkey survey titled "IT Toolkit - Customer Satisfaction Survey". The survey is on page 3 of 3, with a progress bar indicating 100% completion. The survey questions are:

11. If you had to describe the value of IT Toolkit, which phrase below best describes it?

- Finally, a decent looking IT Tool
- The Kaseya brand makes me comfortable
- A simple and easy to use remote access solution
- The pay-as-you-go option is the best part
- This product saves me money
- This product saves me time

12. Are you involved in the Kaseya IT Center Community? (Community.Kaseya.com)

- Yes
- No
- I didn't know about it.

13. Are you involved with any of the Kaseya IT Toolkit Social Media sites?

- facebook.com/ITToolkit
- twitter.com/KaseyaITToolkit
- I didn't know about them

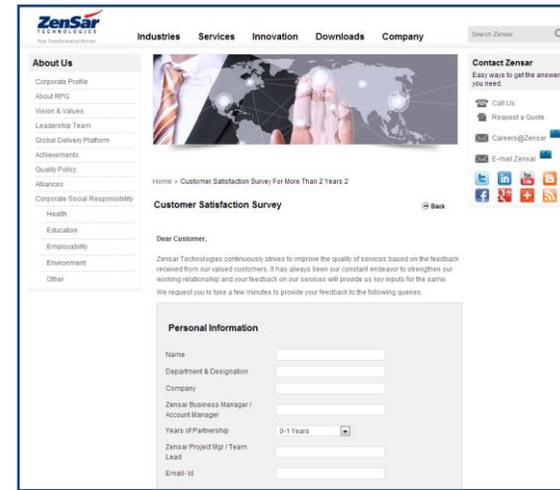
objective clear, as this helps motivate customers to complete the survey and give you accurate feedback that you can act on.

- **No Personalization or ability to track feedback over a period of time.** These are two of the key components to creating a ‘kick-ass’ customer survey. Both components assist with getting more actionable feedback that you can actually use to increase customer satisfaction and make better business decisions.

## 2. Zensar (see the survey)

Zensar are using a customized survey solution which is hosted on their own website with their branding, has a personalized touch to it, and offers a clear objective to the survey responded. But again, just like Kaseya, it's way too long. Already onto the second page and it's asked over 25 questions.

Here are my recommendations:



- **Cut the questions down.** In total they are asking over 40 questions. That's way too many and is going to turn a lot of customers off. Your customers are busy people; they will be reluctant to spend more than five minutes filling out a customer survey.
- **Make the questions relevant to customer satisfaction.** The problem with Zensar's survey lengths stems primary from the questions they are asking. A lot of the questions are not necessary, they provide limited value for tracking and measuring customer satisfaction, so it's hard to justify asking them.
- **Have a clear purpose.** The survey lacks a clear purpose. It's almost like they are using the to survey to try upsell some of their other products.

Here's an excerpt of one the questions on the survey:

*To further enhance your IT investment would you be interested in any more of Zensar's range of service offerings (Tick the service of your interest – you may select multiple service areas). Our account manager will contact you with more details.*

This is multi-sell sales opportunity question. It doesn't need to be in their customer satisfaction survey.

- **Make the survey accessible on all devices.** The survey is impossible to fill out on a mobile device because it is not responsive.

Saxon Fletcher, product designer at Client Heartbeat had this to say about the important of responsive design in customer surveys.

"From our own research we have found that 10.2% of Client Heartbeat survey respondents were using a mobile phone to submit their survey. If your survey is not optimized for these users, you could be missing out on a higher response rate."

**Saxon Fletcher, Product Designer - Client Heartbeat**

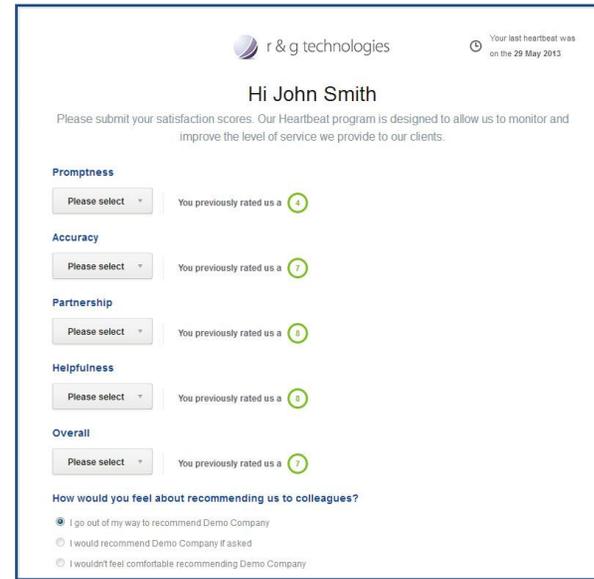


### 3. R&G Technologies (Sample Survey)

R&G Technologies uses Client Heartbeat to survey their customers and track customer satisfaction. This tool lets them send customer surveys, track satisfaction over a period of time, benchmark individual satisfaction against past scores and industry averages, so the company can quickly identify unhappy customers.

Why R&G's customer survey works so well:

- **Short and clear objective.** R&G limits their questions to only six. This means their customers can quickly fill it out within minutes, and assists with the company in getting a [72% survey response rate](#). Additionally, the survey clearly explains why the R&G is asking for their feedback with a clear objective at the top of the survey.
- **Personalized to specific customers.** Surveys are sent personally to the email addresses of each of their customers. This adds a personal touch.
- **Clear branding and responsive on mobile devices.** Instantly, R&G customers can associate the survey with the company as they have a prominent logo at the top of the survey. Customers can also respond via their mobile devices as the page is



The screenshot shows a survey form for R&G Technologies. At the top, there is the company logo and a note: "Your last heartbeat was on the 29 May 2013". The survey is addressed to "Hi John Smith". Below this, there is a message: "Please submit your satisfaction scores. Our Heartbeat program is designed to allow us to monitor and improve the level of service we provide to our clients." The survey consists of six sections, each with a "Please select" dropdown menu and a "You previously rated us a" score in a green circle:

- Promptness:** You previously rated us a 4
- Accuracy:** You previously rated us a 7
- Partnership:** You previously rated us a 5
- Helpfulness:** You previously rated us a 5
- Overall:** You previously rated us a 7

At the bottom, there is a question: "How would you feel about recommending us to colleagues?" with three radio button options:

- I go out of my way to recommend Demo Company
- I would recommend Demo Company if asked
- I wouldn't feel comfortable recommending Demo Company

'responsive'. Since R&G's customers are often on the go, this makes it super easy for them to respond to their customer surveys.

- **Customer feedback is stored and tracked over a period of time.** This is a feature that is unique to Client Heartbeat. R&G is able to track customer feedback on an individual customer level, so they can monitor changes in satisfaction from say, three months ago to today. These changes in customer satisfaction are indicators that help the company follow up with 'at risk' customers and make better business decisions that can help improve overall customer satisfaction for the future.

# 6 Additional Customer Satisfaction Metrics You Should Consider Tracking

These are the six metrics and accompanying questions you can be asking customers to get a deeper idea of their level of customer satisfaction.

## 1. Customer Expectation vs Perception

Does our service live up to your expectations?

This metric is pretty straight forward.

The respondents should be asked to agree or disagree with each statement using a five-point scale, where a one indicates “strongly disagree” and a five indicates “strongly agree.”

## 2. Likelihood To Recommend To Friends

How likely would you be to recommend our company's services to a friend?

This is an age-old question which companies have been using for decades and is also used as a key question by Client Heartbeat. It gives a great representation of how happy your customers are. Research and theory backs up the fact that if your customers are willing to

put their reputation on the line to recommend you, they also trust you and are satisfied with your service.

### 3. Customer Experience vs Ideal Experience

How does our service compare to your 'ideal' service?

Use this customer satisfaction metric to really understand whether your service meets the needs and wants of your customers. This is a great question that comes off as passive but can give you extremely good insight into your customers.

### 4. Overall Satisfaction

Overall, how satisfied are you with our company?

This question reflects the customers 'overall' satisfaction with your service. This can be an open-ended question and you should be looking for mentions of quality, reliability and customer fulfillment. [Scott Smith from Qualtrics](#) believes that these three indicators are the greatest predictors of customer satisfaction.

## 5. Affective And Cognitive Satisfaction

How important are SLAs in your decision to select our company?

Affect is basically liking or disliking something. It is best measured in context of your service benefits. For example – SLAs, response times etc. Customer satisfaction is influenced by perceived quality of these benefits.

Cognition refers to judgment – was the product useful or not? Did it fit the situation or not? Judgments are often specific to the intended use of the service.

## 6. Repeat Purchase Intention

Do you intend to renew your contract when it ends?

Customer satisfaction can influence customers on whether they will renew their contracts or purchase more products from you.

By asking them directly, you can gauge a good indication on how satisfied they are with your company and see whether they will continue doing with you.

# The Importance of Tracking Customer Satisfaction Over A Period of Time

When I decided to put this eBook together I wanted to focus on bringing in real world examples of how companies are implementing some of my recommendations. R&G Technologies is a company I've discussed earlier and one that I want to take a more in-depth look at.

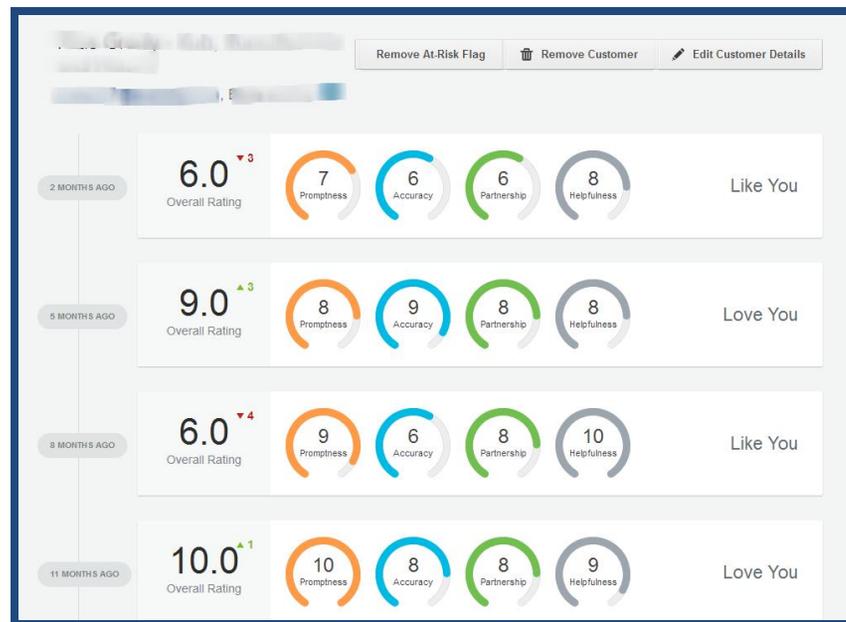
From talking to Mimi Tan, Operations Manager, I learned that one of the biggest ways R&G Technologies retains more customers is by tracking customer satisfaction over a period of time. They take a very personal approach to customer feedback and track satisfaction ratings on an individual level, from one period to the next.



*Example diagram of how R&G track customer satisfaction using Client Heartbeat*

The screenshot on the previous page shows the level of detail R&G is able to track customer satisfaction. From August 2011, too May 2013, you can see ratings improve, then drop, then improve. R&G can use this data to get actionable insights into the satisfaction levels of each individual customer.

Using these actionable insights, they are able to identify customers 'at risk of leaving' and solve their problems quickly.



*A look inside R&G's customer satisfaction dashboard*

Tracking changes in satisfaction allows you to identify the point in time where your customer's attitudes shift, so you're able to rectify perceived failures, avoid reoccurring problems, and maintain what you're doing well.

"Customer Heartbeat provided actionable insights into where we needed to improve our service levels that would lead to higher customer satisfaction. By being able to track satisfaction across a period of time, I was able to see if the changes we had been making from a management level, actually funneled down to an improvement in customer satisfaction."

**Mimi Tan, Operations Manager – R&G Technologies**

# How To Use Customer Surveys To Identify Unhappy Customers

“There’s nothing worse than bringing on a new contract and then finding out your long-standing customer worth \$100K/year has decided to cancel”.

**Gordon Tan, Director – Customer Heartbeat & R&G Technologies**



Monthly recurring revenue is key to the success of a service based business, in particularly service businesses.

Here are some key indicators that can help you identify ‘at risk’ customers by using customer surveys and analyzing the customer feedback data.

## **1. Customer satisfaction scores are below average**

Below average customer satisfaction scores are an alarm bell. Once your customers have completed your customer survey, use a tool like Microsoft Excel to crunch the data into a spreadsheet.

### **How to track it:**

Here you want to work out the average rating for all your customers across the questions you asked. Since you asked questions with a rating scale this should be easy (if you didn’t ask

questions on a rating scale, slap yourself and re-read the section on creating a kickass customer survey).

Now that you have the average scores, flag each customer that is below average as 'at risk'. This doesn't mean they are necessarily unhappy and going to leave (yet), but it is the first warning sign that they might have a foot out the door.

Your job will be to follow up with these flagged customers to see why they gave you below average scores, and identify ways to improve your service to ensure their satisfaction scores improve for the next survey period.

**Tip:** Read the next section on how to follow up with flagged 'at risk' customers.

## **2. Customer satisfaction scores have dropped greater than the industry average over a given period**

This indicator takes a little more work but is one that is very popular with most companies. It involves tracking customer satisfaction scores from one survey period to the next.

### **How to track it:**

Take all your customer survey data from the two survey periods, and match up the customer satisfaction scores for each individual customer so you can see both scores.

Insert an excel formula into your spreadsheet that finds the scores that have changed and highlight those that have changed by more than 20%. Any changes in satisfaction by more than 20% need extra attention. Highlight in red the negative changes (flag these customers as at risk), and highlight the positive changes in green.

Follow up with all customers that are highlighted in red or green to find out more about why their satisfaction scores changed. The at risk customers will need some shoring up, while the green happy customers are perfect candidates for becoming advocates. Ask them why their scores changed – use this feedback and match it up against any customer satisfaction initiatives you implemented since the last survey period. This will help you see what worked and what didn't.

### **3. Customer has indicated they would not feel comfortable recommending you to colleagues and friends**

This is the last key indicator as to whether a customer is unhappy. An important question to ask in your customer surveys is this one:

**Question:** “Would you feel comfortable recommending <your company> to friends and colleagues?”

**Possible answers:** Yes, Not Really, No.

This question takes some theory from the [Net Promoter Score](#), and is a really good indicator of customer happiness. Anyone that answers no, and wouldn't feel comfortable, should be flagged as 'at risk' and needs following up.

If someone would not want to recommend your company to friends, there is something wrong going on. There are problems going on that need to be resolved. It's your job to find out the problems causing customer unhappiness, and fix them before it's too late.

### Additional tips from Gordon Tan

- Customer starts asking for passwords and credentials
- Customer stops wanting to meet with you
- Customer goes quiet about recurring problems
- Customer stops responding to customer feedback and doesn't reply to emails

# How To Follow Up With ‘At Risk’ Customers And Stop Them From Cancelling

Identifying unhappy ‘at risk’ customers is only half the challenge companies face when it comes to customer satisfaction. The other half involves stopping them from leaving and implementing strategies to improve customer satisfaction so they become loyal customer advocates.

Here’s a five step cheat sheet to following up with ‘at risk’ customers.

## **Step 1: Identify at-risk customers by digging through customer survey data and looking at key indicators**

I touched on this in the last chapter, but just to recap – here’s what you need to do.

Break down your customer survey data and look for trends in customer satisfaction where your customer scores are below the average, have dropped more than 20% since the last survey period, or customers that have indicated they wouldn’t feel comfortable recommending you.

**TIP:** Customer Heartbeat makes identifying unhappy customers super easy. Just jump inside your Customer Satisfaction Dashboard, and then browse down to your customers ‘at risk’ highlighted in red. Print out these guys, and move to step two.

## **Step 2: Organize a team meeting with account managers and employees who have had direct contact with the customers**

Once you've identified your at-risk customers, the next step in this cheat sheet involves bringing together your team of account managers and employees so you can brainstorm ideas around why they have given you a poor rating.

This step needs to be completed for each customer at an individual level. I recently sat in on a business meeting at R&G Technologies and got to see how they handled at-risk customers.

What they do is address all at-risk customers during their monthly company meetings. When all employees are in one room, Mimi Tan, Operations Manager, checks off each at-risk customer and opens up the room for discussions so the respective account managers and technicians can join in.

By golly, some interesting feedback comes out. More times than not, just by doing this quick, collaborative open discussion, you can quickly identify a couple of key events in the last period that caused the sub-par customer satisfaction scores.

Without giving away the exact details, in this particular example I sat in on, it turned out that there was a mix-up in communication between the company and R&G. This led to a delay for the customer which ended up hurting the business.

### **Step 3: Follow up with specific customers with a phone call and sit-down meeting**

Now that you have identified some possible problems, step three focuses on following up with each at-risk customer with a phone call so you can try to arrange a sit-down meeting.

*Sit-down meeting! I hear you yelling.*

Yes, it's important to show you care about your customers , so I recommend trying to meet them face to face.

When on the phone call, I suggest you thank them for their feedback, and tell them you take feedback seriously. Tell them that the satisfaction scores they gave you were below what you were looking for and ask some questions to try dig a little deeper into why they gave you sub-par scores.

A good question to get the ball rolling is something like this.

*Why did you give us a rating of 6/10 for Accuracy?*

From doing your little brainstorm earlier in step two, you probably know exactly why, but it's always better to hear it from the horse's mouth. Your customer is always the best form of feedback, so make sure you listen to what they have to say.

After you've been all ears and listened to what impacted their scores, it's time to identify the problem areas. Use the feedback your customer just gave you, map it with the feedback from your staff and present a quick question that goes something like this.

“So, Joe, I understand that one of our technicians installed the wrong program (feedback from staff)... I can see how that has affected your opinion on our ability to get the job done right the first time (feedback from customer). Is that the only problem you've had with us?”

With this short question, you are clarifying that you have the problem identified, and just checking if you've missed anything else.

Finally, it's time to come up with a solution to reassure your customer that this won't happen again.

Since you've done some prep work prior to the meeting, you will have some ideas around a “customer win-back” strategy – this is covered in the next step.

Before I go to step four, let's just recap the importance of following up with at-risk customers.

Remember that you are doing all of this because it shows your customer that you care. You care about their business and you want to win it back. You want to keep them as a customer and you are doing everything in your means to make sure the problems causing unhappiness stop occurring.

Customers love this extra personal attention – it goes a long way towards rebuilding customer satisfaction and can often lead to strong customer loyalty.

#### **Step 4: Propose a “customer win-back” plan**

This is the pointy end of the stick, or the chocolate bit of the ice cream.

It’s the most important step to improve customer satisfaction.

You’ve identified at-risk customers, nailed down the problems that were impacting the poor satisfaction scores, and reassured your customers that the problems won’t happen again. Now it’s time to propose a “customer win-back” plan.

This is something I recommend all companies use as a way of asking for one more chance to regain their customers trust and re-strengthen the relationship.

Because let’s face it, you’ve let your customer down. Whether it was an inaccurate installation, a poor service that didn’t meet expectations or an implementation that didn’t follow guidelines, your customer is going to have a hard time trusting you again.

Take a look at a real example from a Client Heartbeat customer.

*The initial problem that caused the customer to be at risk was a result of poor service response times. The customer expectations in the IT Contract stated that the IT Company would fix category two problems within four hours. For one reason or*

*another, we had taken over 10 hours to get the problem fixed. This just wasn't good enough and breached our service level agreements.*

I recommend in this example, the company's "customer win-back" plan should include strict SLAs and maybe even tie it to an incentive-based system. Mimi Tan of R&G Technologies told me their company has a refund policy based around their SLAs, so when they don't meet them, their customer gets reimbursed.

Furthermore, I recommend telling your customer that if you breach SLA's one more time, you'll personally cancel the contract – that's how confident you are that you will not let them down again. Your customer win-back plan might also include three to four other points as well.

Other great things to include are additional services at no charge, free training on some new products, or two hours of free consulting. It can be something that is not going to blow your budget, but is a nice gesture to show that you care.

The key here is to show that you really care, show that you understand how important a high quality of service is to you, and that moving forward, you're personally going to do everything in your means to make sure the level of service exceeds their expectations.

Most the time, your customer is happy to give you one more chance.

So if they do, it's time to deliver. No more excuses, this is your final chance.

## Step 5: Implement customer retention strategies to win back trust and rebuild relationships

The final step in this cheat sheet involves implementing ongoing initiatives that are geared toward earning back trust, building customer loyalty and encouraging the customer to become a raving advocate who refers new business.

I'm only going to include my favorite four customer retention strategies here, but you can read all nine strategies in this post.

- **Reset customer expectations**

Make sure you reset customer expectations so they are now inline with your new service level agreement. Customers always remember negative experiences, so don't try and be a hero and set expectations too high. There is nothing that kills customer satisfaction more than under delivering on your promises.

- **Become their expert**

Businesses rely on you to deliver a specific product or service. I recommend doing more than just the bare minimum. When a customer asks you a question within your area of expertise, answer it – offer advice for free. Let me explain this with an example.

You're an IT Company, and a customer asks you what mobile plan they should get. You don't sell mobile plans, but as an IT Company, you've got a good grasp on what the customer needs.

As the "expert on all things IT" you should relish this opportunity to help your customer. By doing this, they become dependent on your services way beyond the product you are selling. This leads to 'sticky' customer loyalty and is proven to help improve customer satisfaction.

- **Start implementing anticipatory service**

Anticipatory service is a proactive approach to customer service. Instead of waiting for problems to occur, a company that implements anticipatory service can eliminate problems before they happen.

Let's take a look at two examples of anticipatory service:

- A major airline proactively texts customers to advise them of flight delays.
- A corporate billing department alerts customers when an invoice is nearly due.

- **Go above and beyond**

This strategy involves going out of your way to help your customer.

If you read an article that might be of interest to a specific customer, share it with them! Send them a quick email, tell them that you were thinking of them and thought they might find value in it.

Additionally, you could invite them to a free training session. Put on a lunch, invite all your customers in and give them a full demo of your new products, provide training where necessary and just add a bit of value.

# How To Create A Customer Experience That Delivers High Customer Satisfaction and Creates Customer Advocates

## Treat your customers like they are your boss

It is not the employer who pays the wages. Employers only handle the money. It is the customer who pays the wages. Those were the famous words from Henry Ford.

I've recently been reading Jeffery Gitomer's book on customer loyalty and its relationship with customer satisfaction and whoa, he's got some super principles that I really connected with.

One that really stood out for me was this principle – **Your Customer is your Paycheck.**

“Don’t be fooled by the signature at the bottom of your payroll check – the guy who signed the check didn’t put the money there – your customers did.”

**Jeffery Gitomer, Author – [Gitomer.com](http://Gitomer.com)**



With no customers, there is no money to pay you. He goes onto say that without customers, you’re not getting paid, your business is worthless, and your wallet is empty.

I think this is a great point and really flips the angle on customer service. If we treated all customers like they were our boss, we would go out our way to make sure their experience with us was 10 out of 10.

Here are five ways you can impress your boss customers:

### **1. Thank all your customers for their business, and mean it**

This is pretty straight forward. Be thankful for your customers continued support and business. Without their purchases and repeat purchases, you wouldn’t be receiving your paycheck.

Saying thank you goes a long way to showing you appreciate your customers. An appreciated customer is a happy customer.

## **2. Go out of your way to help your customers**

Jeffery mentions in his book that customer service should be renamed to customer help. If every time you interacted with a customer and you thought help rather than service, I can guarantee your customers would have had a better experience.

Try going out your way to help your customers. You will be surprised how thankful they will be for your extra help, not to mention the customer loyalty it will build.

## **3. Try to impress your customers, like you want a raise**

Remember every time you tried to impress your boss by going out your way for something, or making sure you met some deadlines that seemed out of reach? Well, try doing that for your customers. Act like your customers are your boss, and do everything you can to impress them as if you wanted a raise.

## **4. Think about your paycheck every time you talk to a customer**

Next time you check your bank balance after pay-day or receive your hard copy check, think about whose money that really is. Think about your customers.

## **5. Keep your promises and integrity**

If you told your boss you would have some work done by close of business Friday, you'd make sure it's done wouldn't you. Well, the same goes for your customers. If you promise to

call them at 4.30 – make sure you call them then, not five minutes later or the next day.  
Integrity goes a long way to building customer loyalty.

Companies need to look at ways to create a customer-focused culture, where employees treat customers like the kings. Because let's face it, at the end of the day, your customer is your paycheck.

# Build ‘Sticky’ Customer Loyalty That Increases Customer Satisfaction

Building customer loyalty is hard, but it is one of the most important things for your business. It can cost nearly seven times more to acquire new customers than to keep existing customers.

There’s a lot of information around the web on how you can build customer loyalty and retain more customers, so instead of reinventing the wheel, I’ve combined the best 18 strategies from five recognized authorities in the space, and popped them all into a simple, single post for you.

These customer loyalty strategies have been put together with thoughts from [writers at Entrepreneur.com](#), [Jessica Malnik over at the BigCommerce blog](#), [Mark Sunshine; Forbes.com contributor](#), [Jessica Nash](#), and [editors over at Inc.com](#).

## 1. Let customers know what you are doing for them

This can be done via a quick informal phone call or a friendly email newsletter – either way, you want to subtly let your customers know about all the work you have been doing for them. For example, you may have spent part of your weekend fixing up a few problems for a customer – you can hint about this when you follow up the next week. It’s important to realize

you are not being cocky here; you are simply letting them know you value their business and are willing to go the extra mile for them.

## **2. Write a personal letter**

For long time customers, get personal. Tell them you value their business. Send them a letter like this. “I was grabbing a coffee the other day and your name popped into my head. How has business been for you? Are you on track to hit your targets this year?” Be genuinely interested in their business and life, be personal.

## **3. Remember special occasions**

Send regular customers birthday cards and holiday cards. Try not to be boring (like all the other companies). If you can make these special cards/gifts unique in your own way, that will go a long way to building customer loyalty. Use your creativity and find a way to tie the gift ideas into your business, the customers’ business or his/her personal life.

## **4. Pass on information**

If you read an article, see a new book, or hear about an organization that a customer might be interested in, drop a note or make a quick call to let them know.

## **5. Follow up calls with customers are business development opportunities**

When you talk to your customers, they'll probably have referrals to give you. Make sure you take an open approach to every contact you have with each of your customer, you never know what new business you can get out of it.

## **6. Go to where you customers hang out**

If you want to create customer evangelists, you need to hang out where they already are. If they're on Facebook, or Pinterest – jump on there and engage them. If they are on a wildly popular body building forum, start contributing discussions on there.

## **7. Strive to empower and educate your customers**

*Give a man a fish and he will eat for a day. Teach a man to fish and he will eat for a lifetime.*

Become your customers go to adviser on all things relating to your industry. For instance, if you're an IT Company, be their IT guy. Help them with choosing the best mobile plan, let them know about upcoming compliance regulations. Go the extra mile.

## **8. Invest in a self-service channel**

Create a knowledge-base or FAQ section of the common questions and problems that your customers encounter. Direct customers to specific answers – this will save you from answering the same question 100 times, plus it will give your customer a solid response to their problem.

## 9. Make customer retention a priority

This may seem pretty obvious, but I'm serious. Make a commitment to put [customer retention](#) at the top of the list. If you spent as much time building customer loyalty and retaining customers, as you did acquiring new customers, you'd have the world's best advocates and a 100% retention rate!

## 10. Owners must lead from the front

Let's face it; everyone loves dealing with the business owner. There's something about dealing with the face of a company, the number one man, the boss in charge. As the business owner or CEO, you should be the one engaging existing customers and building customer loyalty. Make this your priority and not anyone else's.

## 11. Understand the true purpose of marketing

Effective marketing is about building trust and developing relationships. Too many times people think marketing is just push a bunch of ads and they will come. **Well, it's not that easy.** Tom Asacker, marketing author, explains the purpose of marketing it to 'create and maintain a strong feeling with customers so they are mentally predisposed to continually choose and recommend you'. Building customer loyalty is about building trust and developing relationships – *you see how it's all interlinked?*

## 12. Tap into what your customers want

By understanding what your customers actually want, you can build relationships that are memorable and set you apart from the competition. Focus on understanding each of your customers on an individual level and find out what really makes them tick, and why they like doing business with you.

## 13. Focus on integrity, which leads to trust and loyalty

Integrity involves fundamental behaviors such as keeping your word, being honest, providing a consistent level of service, and being reliable. Businesses that demonstrate a high degree of integrity are seen as trustworthy.

Building trust requires businesses to continually put customer's interests ahead of their own. Customers will see this, and you will earn their trust and go a great distance to building customer loyalty.

## 14. Never take loyalty for granted

A successful marketing strategy will bring customers through the door, but only a successful customer loyalty and retention plan will keep them coming back for more. **Never take customer loyalty for granted.**

## 15. Create enlightening experiences

A successful business is about more than just selling stuff. It's about selling experiences. Chris Zane of [Zane Cycles](#) knows this all too well. He focuses on making his customers feel good, and does this by not charging for **every add-on**, and now gives away free drinks at his in-store coffee bar. His customers walk away with an experience, an experience that will keep them coming back for more, and telling their friends about. This will go a long way to building customer loyalty.

## 16. When you do wrong, make it right

Resolving customer complaints is the best way to build customer loyalty. By handling complaints in a professional manner, you earn the opportunity to fix the problem and regain customer trust. In doing so, you engage your customer on an emotional level. Providing you resolve the problem, your customer now has a very unique experience with you, and you have shown first hand your willingness to recognize the problem and go out your way to ensure it is fixed and won't happen again. **Customers love this.**

## 17. Quantify customers' love

Talk to your customers; ask for their opinion on your service. It doesn't have to be extravagant; a simple *customer satisfaction survey* will do the trick.

## 18. Build a loyalty program

Whether you want to use old school punch cards or new mobile apps, a loyalty program can go a long way to keeping your customers coming back. These programs are a great way to engage your customers, build a relationship and drive repeat business.

# Avoid Making These 12 Common Mistakes That Are Killing Your Satisfaction

As Bill Gates once said, “Your most unhappy customers are your greatest source of learning.” No business is immune to unhappy customers. But before you start learning from unhappy customers, you first need to understand customer satisfaction and stop making mistakes that are hurting your business.

Here are 12 customer satisfaction thoughts to get you started.

## **1. Stop ignoring customer feedback**

You can't learn anything if you don't take action. If a customer leaves you feedback, make sure you follow up with them and make sure they feel listened to. Use the feedback to create a better experience for all your customers.

## **2. Stop taking customer feedback personally**

Take a holistic approach to customer feedback. Customers never leave feedback because they want to personally attack you, they leave it because they are upset and want their problem resolved or service improved. Learn from the feedback so you can make sure it doesn't happen again.

### 3. Stop setting customer expectations too high

You can often set the bar way too high when trying to close a deal or impress a customer. Make sure you [set customer expectations](#) appropriately right from the get go, so you can ensure both your customer and your company are happy with the level of service being offered.

### 4. Stop taking loyal customers for granted

Loyal customers are your biggest [brand advocates](#). They are the customers who are telling friends about your company, referring new business and refusing to buy from competitors. You need to remember to maintain a high level of service for these guys, even if it seems like they'll never leave. One slip up and you could lose one of your company's biggest assets (a loyal customer).

### 5. Stop using automated machines

One of the biggest customer retention mistakes a company can make is to use an automated phone or email system. Nothing annoys a customer more than listening to long automated recordings that keep them waiting and leave them disappointed. *Remember this saying..?*

*All things being equal, people will do business with, and refer business to, those people they know, like and trust.*

No-one trusts a computer so don't use one to automate your customer service.

## 6. Stop using long, boring customer feedback surveys

You wouldn't spend 10 minutes of your life filling out a long and boring survey at the mall would you? So why put your customers through that? Customer feedback surveys are a great way to get actionable insights into how your customers feel about your service, but it's important to make them short, quick and relevant.

## 7. Stop ignoring your competitors

You may think you're better than your competitors, but I can guarantee they are contacting your customers and trying to make them switch. [Anne Miner from The Dunvegan Group](#) believes, *'the way a customer views their competition'*, as one of three key factors that determine how strong a bond a company has with their customers. If none of your competitors are perceived as to be better, there is a lesser likelihood the customer will leave. Make sure you are keeping an eye on your competitors and try to ensure your perceived service is better than theirs.

## 8. Stop only measuring customer satisfaction

A satisfied customer isn't a retained customer. Research from The Dunvegan Group shows that 20% of customers who said they were 'satisfied' ended up switching providers to a competitor. A better measurement of how likely you can retain a customer, is customer loyalty. A loyal customer is one that will die before switching to a competitor, a loyal customer will travel five miles out of their way to buy from you over a competitor.

## 9. Stop forgetting special occasions

If you're not sending birthday emails or cards, you're missing out on an opportunity to strengthen a customer relationship. Strong customer relationships lead to strong customer retention. Put a reminder in your CRM for when your next customer's birthday comes up and remember to send them something special. Try being creative by sending them something that's fun, but also links back to what your business does.

## 10. Stop focusing so much on customer acquisition

It costs seven times more to acquire a new customer than it does to retain a customer. Annie Miner found that their customer care and retention programs produced a return on investment of 10:1 or higher. What does that equal in actual revenue? We're talking thousands of dollars, sometimes millions! You must look to allocate some budget to customer retention.

## 11. Stop discounting

Trying to keep customers by offering discounts is a short slip-n-slide to failure. *What is that telling your customers?* You're devaluing your service and basically telling them that it's not worth what they were previously paying. Instead of discounting, offer guarantees or added value. For example, try offering a free month to compensate the last month's failure, that is a much better way to motivate a customer to stick with you.

## 12. Stop being reactive

Focus on stopping problems from happening, before they even happen. Taking a proactive approach to customer service means putting systems in place to predict problems before they become customer facing headaches. Predictive churn modeling can help a company develop a better understanding of the steps and stages that create customer churn.

# Importance Of Setting Customer Expectations Early

I consider this strategy one of the easiest to implement and improve customer satisfaction. / *mean come on, customer expectations, that's not hard right?*

Well, you'd be surprised. **A lot can go wrong during the sales process.** Whether it's sales guys trying to sweet talk a close, or prospects not fully understanding the agreement, somewhere along the way a customer's expectation of the service he/she will receive, is established.

It is your job to make sure that this perceived expectation of service, meets what you are capable of delivering.

## **1. Be honest about customer expectations in sales process – don't over promise**

I can't stress how important it is to set expectations right from the get go with your sales people. There is nothing a customer hates more than a company under delivering. When your sales guys set expectations so high and you can not deliver, that's when you run into problems.

A great example I like to bring up is SEO (Search Engine Optimization) companies. There is such a bad rep about these guys just ripping people off left, right and center. But at the end

of the day, a lot of the time it's the sales guys (or biz owners) who are setting expectations far to high.

Comments like, '*you'll rank first page google*' are common practice and when they fail to deliver, the customer is unsatisfied, complains and cancels.

Think about a particular service that you have chopped and changed providers frequently. Ask yourself, *why did I leave the last company*. 68% of the time, it will be because their service did not live up to your expectations.

Be honest, and set accurate expectations early to stop customers leaving later.

## 2. Revisit customer expectations after the sale closes

This step is particularly helpful for business owners who take a back-seat in the sales process. If you have someone else handling all your new customer acquisition and sales, *make sure you revisit expectations with all new customers after the sale closes*.

This is a great way to ensure that everything your sales guy has promised, actually is doable. It will also give you a good chance to understand what they want and make sure you deliver and **exceed their expectations**.

A customer loves when their expectations are exceeded.

Have a think about the last time you went, *whoa that was a great experience*. It may have been the local Steakhouse, or the friendly lady down the road that sells you cookies. Something about their service made you go whoa.

### 3. Keep your promises and apologize when you don't

Everybody makes mistakes from time to time. Sometimes you wont meet customer expectations for one reason or another, there might be internal or external factors... but lets face it, **sometimes sh\*t happens**.

It's times like these you need to be honest with yourself and apologize when you don't meet customer expectations.

Rune Tispmeak from [Stea IT](#) speaks about this in our case study on how he [saved a \\$180,000 year contract](#) – definitely worth a look and see how he went about admitting his shortfalls and overcoming a sticky situation to re-earn a customer's trust and further strengthen the relationship.

Here's an excerpt from the case study:

“I was concerned enough that I got straight on the phone to the managing director and we had a very honest discussion. I said to him as a business owner I valued honesty and constructive criticism and if there were problems I wanted the opportunity to correct them. He admitted to me, that they were considering all options as they did continue to have ongoing concerns about our ability to meet the needs of the organization”.

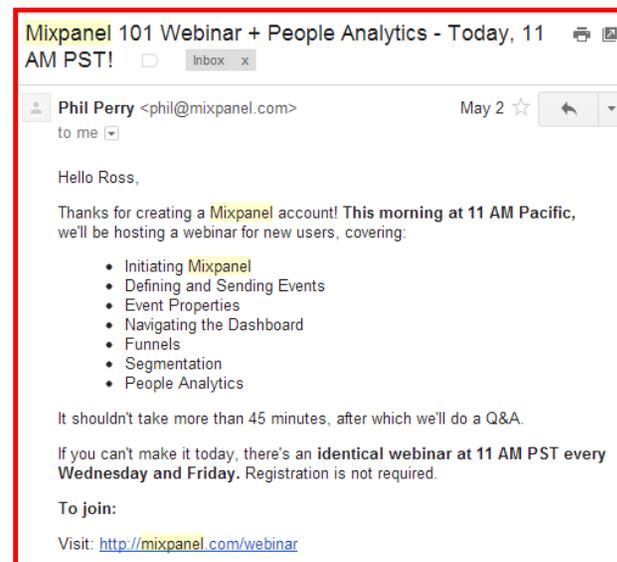
**Rune Tipsmark** - [Stea IT](#)



# 5 Ways To Use Email To Improve Customer Satisfaction

## 1. Use email to stay in contact with customers

Mixpanel does a great job of staying in contact with their customers using email. I signed up for Mixpanel in May and since then I've received four emails from them. The first email was a helpful getting started checklist. The second was a personal invite to attend their latest webinar. The third email was another personal email from Will (the Solutions Architect at Mixpanel) and, most recently, they emailed me a quick feature update with some of their latest announcements.



Example of Mixpanel Email

It's simple, engaging and adds value to my experience with their product. These emails have helped me feel as though we have a good relationship with the company, *even though I have never reached out to them with any support questions.*

This shows just how effective email can be at engaging your customers and staying in contact with them. Mixpanel use email as a medium to push personal and informative messages, leading to an increase in their customers' investment in their product. This goes a long way toward building a strong sense of customer loyalty.

## **2. Use email to send personalized messages to specific groups of customers**

Are you sick of waking up to five completely impersonalized emails every morning?

I bet you are.

Here's a typical scenario: you get a series of three email from a company you just signed up to explaining how to add contacts to their system despite the fact that you have already added contacts yesterday and have everything set up.

You can do better. It's not difficult to track your customers' actions and send more relevant emails (or no emails at all, if that provides a better user experience!)

Tools like [Vero](#) help this process by triggering emails only when a customer takes a specific action inside your app, on your website or when browsing your eCommerce store. This way, you can make sure the emails you are sending are personalized and relevant.

## **3. Use email to send friendly reminders**

[Jana Fung of MixRank](#) recommends sending a reminder email whenever there is a major marketing event going on in your customer's geographic location.

One company that does this well is InfusionSoft. They are hosting an “Infusioncon” event in Sydney later this year and, as a way to inform me (an existing customer), they popped up a promotional banner on the first page after logging in. This popup was also backed up by an email. Both were targeted to me, as an Australian.

In a world where lots of us build customer relationships via email and never actual meet face to face, it’s always refreshing to be invited to a live event.

The benefit of sending friendly reminders about events or other marketing activities is that it shows your customers that you really care about them. This is even truer if you use targeting: after all, you went out of your way to make sure they received an invite.

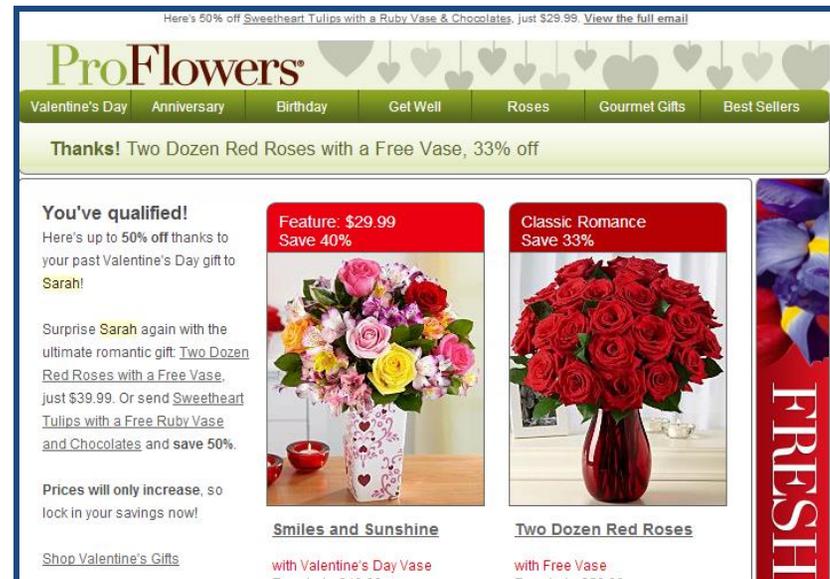
Other examples of situations when you could send friendly reminders include:

- When a renewal is due
- When an invoice is ready
- When an upcoming webinar or blog post has been published (that’s relevant)
- When special promotions are available to customers
- When you are hosting a new webinar
- When you put up a new resource

#### 4. Use email to send special promotions to customers

Special promotions or discounts are a great way to encourage existing customers to make repeat purchases. Email is a common channel to use when sending out these promotions to customers. Remember to use an email marketing tool that lets you send promotions based on specific segmentation or actions your customers take (see point two above!)

ProFlowers uses email to send promotions to customers who can take advantage of events happening in the near future, like Valentine's Day.



*Here's an email I got from ProFlowers*

This is a great example of using targeted email to send special promotions. To explore this more take a look at the masters, Amazon, in this post on [6 lessons you can learn from Amazon's Killer Email Remarketing](#).

## 5. Educate and add value to customers using email

Email can be used to help educate your customers on your product or service. An educated customer is a generally a well-retained customer as they truly understand the value of your offering.

If you didn't know how to work an oven, you'd probably throw it out – right?

The same goes for your product or service.

Email is the easiest way you can educate your customers. A great example of this is WP Engine's e-course. As Kareem discusses [in his blog post](#), WP Engine sends out eight education emails over a one-month period. Each email focuses on describing a benefit of hosting with WP Engine, then goes on to explain why it's important to your business, and finishes with a call to action.

That is exactly how to use email in a way to educate customers on your product. For another idea, you should also educate your customers on specific issues within their industry.

The goal here is to become an information-source so valuable that your customer **depends on you** for the latest industry trends or actionable how-to guides. They will no longer see you

as another product or service they have to pay for but something that their business depends on for success!

# How To Use Social Media to Improve Customer Satisfaction

It costs a company [\\$234 every time they lose a customer](#). Whether you're the marketing manager or business owner, I know you don't want to be the one responsible for losing the next BIG customer. That's why I propose you start using social media to monitor and increase customer satisfaction.

While exploring this topic, I found some great research by [Maritz Research Inc.](#) They have started investigating the power of using social media in their customer satisfaction and loyalty research. Randy Brandt, Vice President of Customer Experience and Loyalty, found that by combining traditional research with information found on various consumer-generated social media websites, they were able to identify two specific action items that have now become top priorities.

This shows that there's much to learn from your customers on these social media websites.

So, let's stop only using traditional customer service channels and explore five quick ways you can use social media to increase customer satisfaction.

## 1. Use Social media to monitor brand mentions and sentiment

Companies can use social media monitoring tools like [Sprout Social](#) to track brand mentions and engage with customers. Not listening to your customers is a common [customer retention mistake](#).

I recommend taking a page out of the Wells Fargo book and starting to use social media as a customer service channel. It's easy to get started – just set up a Twitter handle for customer support and direct users to leave messages directly there.

For example, I work for a company called [Client Heartbeat](#), and we would use something like @HeartbeatSupport.

## 2. Use social media to communicate prompt and professional messages to customers

I strongly believe we are living in a world of instant gratification. This has its positives and its drawbacks, but more importantly for you as a marketer, it has led to your customers having short attention spans and wanting fast responses.

This has spurred the growth of sites like Twitter, Facebook and YouTube. A customer can quickly go on to these sites, engage with someone or a company, and expect an answer straight away.

Thus, unless you want to end up running a company in the prehistoric ages, you need to look toward using social media as a platform to communicate with customers promptly and professionally.

Tech startups do an awesome job at using social media to communicate with their customers. They often have tighter budgets, and since their customers tend to be tech savvy, many of these startups don't have phone numbers listed on their sites and instead just direct users to "tweet their support handle."

These companies are so good at offering quick, accurate and professional responses... the customer actually wants to use this form of communication. With that being said, it's important you know how to use Twitter correctly.

Here are three quick tips to communicate using Twitter:

- Respond quickly, even if it's just to say you got the message.
- Communicate using a friendly, human voice – don't try and be a corporate bigwig.
- Follow up with customers to gauge feedback on your performance.

### **3. Use social media as a customer support channel**

Let me explain this for you. Your customers are now [using their mobile phones 150 times per day](#). So, when they are communicating with companies, what do you think they want to use?

Their mobile!

It's no longer good enough just to offer a support email address or a support 1-800 number. Your customers want to reach you via their mobile, using social media.

That's why I recommend you set up a designated social media customer support channel. Customers are so comfortable with just tweeting out customer complaints and questions, you can now give them an avenue to reach you, and give yourself the opportunity to resolve any problems fast.

Reuven Gorsht writes a [good piece on this topic](#) over at Forbes.com.

“Where five years ago we could tolerate waiting 24 hours for a response from a customer service email, we are increasingly living in a real-time world where we want to know the answer right now.”

**Reuven Gorsht, Vice President, Customer Strategy – SAP**



I agree with Reuven; there is a big opportunity for companies to use social media for customer service. Now that everything is accessible online through social media, as a company, you now have an opportunity to respond. You can literally solve a problem, instantly, from anywhere in the world.

With customers paying less and less attention to what brands say about themselves, being able to engage customers on their terms is a win-win.

To give you an idea of how some big companies are using social media as a customer support channel, a [recent study by SocialBakers](#) found Tesco to be the world's most socially devoted Twitter brand. They've accumulated a whopping 75,904 Twitter followers, while clocking an impressive 65.88% response rate with average response time of only 81 minutes.

If you need more convincing, a study by [Simply Measured](#) found that 32 percent of brands now have dedicated customer support handles. The same study found a significant growth in customer service tweets with a 63 percent increase quarter over quarter.

#### **4. Use social media to hold regular Q&A sessions**

Celebrities are using social media to hold Q&A sessions. A great example was the US President, Barack Obama, [jumping on Reddit](#) to answer questions from users.

Companies can do this too, but most of the time it is a senior employee or “real person” of the company running the Q&A. We've seen [Bill Gates](#), [The Lonely Island](#), [Roger Federer](#), and many, many more influential people run Q&As on Reddit and other social media sites.

I recommend companies do a Q&A to give their customers an avenue to express their concerns, comments or compliments. Oftentimes it's your unhappy customers who will not give you feedback. Running a Q&A encourages customer engagement and will help you identify any customer problems.

## 5. Use social media to empower top customer advocates to respond for you

This is my final recommendation, and the one I think is the most powerful. An interesting model is being implemented by some of the world's biggest companies. It exists and is practiced in the customer community's space.

Let's take a look at a real example. Over on the HP community site, a member spends upwards of 30 unpaid hours a week responding to queries on their discussion forums. In this case, HP is using their customers to answer HP-related questions. They empower their members with community management tools that encourage engagement.

Another great example is the [Google AdWords community group](#). Contributors are encouraged to continue to answer queries and strive to become a "top contributor." Top contributors are recognized as industry experts, which really helps to keep them motivated and keep the community active.

In both cases, these companies are empowering their customer advocates to assist with customer service. This helps each company to reduce expensive customer service costs and more times than not, offer a better experience.

How can you leverage your community of advocates to help increase customer satisfaction?

# How to Blog to Increase Customer Satisfaction

For this section, I sourced some expert opinions from Joshua Feinberg, co-founder and CMO of [SP Home Run](#). Joshua specializes in IT channel inbound marketing to help companies find customers, retain customers, and grow by using proven inbound marketing systems.

Here's what Joshua Feinberg had to say.

## **Blogging to Increase Customer Satisfaction**

Let's face it. It can take a lot of time and resources to acquire great customers for your business. But with the right services, right pricing, and right approach to customer satisfaction, many of your best customers should be with your firm for years to come!

To approach customer satisfaction and customer retention correctly, you need to have an exceptionally good pulse on how your customers perceive your firm's value. Client Heartbeat is an excellent tool for staying on top of your key customer satisfaction metrics. But what can you do tactically and proactively to increase customer satisfaction?

## Blogs Aren't Just for Lead Generation

Your blog can be a great tool for making this happen. While most businesses and marketers plan their blogging strategy around attracting targeted leads to fill the top of their sales funnel, blogging can also be a terrific way to communicate with your firm's value.

## Picking the Right Blog Topics

How do you decide what to blog about for your customers? It's simple. Use the data. Run reports on your most frequently requested help desk services and write blog posts about each and every one of these problems.

When you have a batch of these related blog posts, say 10 or 20 in total, build a sitemap or table of contents that links all of these posts together and call it an FAQs page - which should be prominent on your website navigation and automatically e-mailed to all new customers.

## 10 Best Practices for Customer-Focused Blogging

The key thing with blogging for customer satisfaction requires most of the same best practices as blogging for lead generation:

- **Concentrate on one topic** at a time that can be explained in 600-1,200 words.
- **Use a keyword tool to select a related keyword phrase** that you can then very lightly optimize (SEO) that post with, so it has a chance to get found.
- **Add social sharing buttons** to the top of the post to make it easy for customers to spread your great content.
- **Write for skimmers**, using abundant headings, subheadings, and numbered or bulleted lists.
- **Re-purpose the blog post into visual content assets** that expand your reach to different audiences. Approached correctly, an image, screencast, slide deck, or infographic can be extremely effective at driving greater customer satisfaction.
- **Embed the newly-created visual content** to make the post more “sticky” and less likely to result in a bounce.

- **Include at least one relevant call to action (CTA)** at the end of the post so you can point delighted readers to your preferred direction. For an IT customer blog, many times this CTA will focus on encouraging reviews or testimonials.
- **Build internal anchor text links** from other already search indexed pages on your website.
- **Announce the new blog post** to relevant segments of your in-house contacts database.
- **Add the new blog post to any automated nurturing messages** that trickle out to new customers following sign-up.

Many marketers spend most of their blogging resources creating content for the top of the sales funnel. And for good reason: targeted lead generation is extremely important.

But for a business that's highly-dependent on maintaining customer satisfaction, blogging can also be a great tool to help your customers get more value from your services and transform luke-warm customers into your biggest raving fans and promoters.

Joshua Feinberg is co-founder and CMO of **SP Home Run**, an IT channel inbound marketing agency that helps find customers, retain customers, and grow by using proven inbound marketing systems. To learn more about how your MSP business can attract the right visitors to its website, convert visitors to leads, close sales with new customers, and delight customers for long-term retention, download your free copy of the [IT Channel Inbound Marketing Planning Guide](#).



# How To Leverage Customer Advocates To Generate New Business Referrals

## How To Analyze Your Survey Data To Pinpoint Customer Advocates

Customer advocates are the people who love your product or service, and actively rave about it to colleagues and friends.

Businesses must meet and surpass rising expectations to turn customers into advocates, according to Janine Modaro, Telstra director of integrated service management, network applications and services.

Modaro talks about [customer advocacy as a step beyond satisfaction](#). “It’s the advocates that are actually going to make our businesses succeed and make our businesses grow”.

The big challenge is identifying your customer advocates. That's where your customer survey data can help.

**This is a two part approach:**

- Dig through your customer survey data and find out your average satisfaction score. Once you have your average, any customers that are scoring more than 10% above the average are your potential customer advocates.
- In the sixth question we recommend asking, it is designed specifically to identify customer advocates. The question reads, “How would you feel about recommending us to colleagues?”.

**How would you feel about recommending us to colleagues?**

- I go out of my way to recommend Demo Company
- I would recommend Demo Company if asked
- I wouldn't feel comfortable recommending Demo Company

*Example question asked using Client Heartbeat*

It's a popular question used by the [Client Heartbeat](#) and intelligently identifies customer advocates. Anyone that answers “I would go out my way to recommend your company” – is considered a potential customer advocate.

# Three Ways To Find And Convert Customers Into Advocates Using Social Media

Social media is not just a fad. Lots of companies I speak with seem to be ignoring this marketing channel as some form of trend that's going to past.

They are living in a world where social media is still for kids and the real business gets done over a phone call or at a business conference.

Well, they couldn't be further from the truth. Social media is BIG and it's here to stay.

Why? Simple - there are strong fundamentals that are driving the growth of social media. For more on this I strongly recommend you read Michael Brito's presentation at the 2013 Marketo Summit – [Social Media + Storytelling = Awesomesauce](#) (or [watch the video here](#)).

Social media is just an extension of our lives. It's enabling storytelling to be distributed to our close friends and colleagues quicker than we've ever done before. It means content and stories can now be shared and distributed around the world in minutes.

*So how can you leverage social media to find and convert customers into advocates?*

## **1. Listen to what your customers are saying**

Even if your customers are not mentioning you in their social media posts, you should be following them and listening to their conversations. As Orwellian as this sounds, this is the new era of market research. People are publicly sharing their purchases and opinions on social channels, so leverage that data. Use it to improve your products and engage your customers in a conversation about how you can serve them better.

## **2. Make customers feel special**

People follow your company on social media for a reason- to get something they otherwise could not get. Maybe it's a special discount on your product. Maybe it's to be notified of product releases before anyone else. Maybe it's just to read your great content. By connecting with your customers on social media, your advocates will naturally come out. They will be the one's 'liking' your Facebook posts, 'retweeting' your updates and sharing your blog articles. Keep these conversations going, keep engaged with your customers, and you will begin to turn them into advocates.

## **3. Reward customers who are talking about you**

Customers who are positively talking about you on social media are your advocates, whether they know it or not. You can leverage these customers into 'raving advocates' by rewarding them. A great example is Scotty's Brewhouse in Indiana. They recently noticed a couple of people talking about their restaurant on Twitter, discussing what meal they wanted for lunch.

Scotty's Brewhouse owner, Scott Wise, picked up on this and sent a tweet through to offer them all a \$10 giftcard.

This was brilliant! A great way to recognize customer advocates, reward them, and turn them into raving marketing ambassadors who will continue to refer new business in the future.

Jeremy Williams discusses more about this in his article titled, [Social Media for Customer Retention](#).

Here's a brief snippet of what he had to say about Scotty's Brewhouse.

The simple act of rewarding customers for their loyalty (or, in this case, just for talking about the restaurant) ensures an even more fervent fanbase for his restaurant. Scott will see that \$50 investment returned many times over because he was listening to his customers.

- Jeremy Williams, [Social Mediarology](#)



# Importance Of Building Relationships With Customer Advocates

Potential customer advocates aren't going to just start referring you new business straight away. You need to strengthen these relationships and guide them to the glory land of what I call '*raving advocacy status*'.

Here's some strategies you can use to help nurture your potential customers into advocates.

## 1. Invite them to a lunch

Put a lunch on for your most valuable customers. Show them that you care and even offer some free training on new products/services you are offering.

I've seen this done really well at R&G Technologies. For their most valuable customers, the company invites some representatives to the offices and puts on a free lunch, while also giving them training on some new products.

This is a great way to build customer loyalty and strength the relationship. It shows your customers that you are willing to go the extra mile, and that is reflected when they start talking about your company to business colleagues and friends.

## 2. Send them an email newsletter

A monthly email with valuable content is a great way for you to connect with your customers and strengthen your relationships.

Here's what you can include in your emails:

- Any industry news or updates that affect your industry (think government regulations, new industry requirements.
- Product news and links to product training
- Company updates

## 3. Invite them to events

This isn't the same as a lunch. This one im talking about inviting them to specific industry relevant events that are geographically located. For example, you might have some customers in the accounting vertical. Your company has decided to sponsor a local accounting converence and you have three extra tickets to give away. **Give them to some of your potential advocates that are in the accounting space!!!**

This shows them that you care about their business, willing to go the extra mile to help, and gives you an opportunity to spend some more time and cement the business relationship.

Most the time when done right, this yields tremendous results. Remember the saying, *to wine and dine a prospect?* Well, this is sort of the same, but you're *wining and dining a customer!*

# How To Get Testimonials from your Customer Advocates

Testimonials can do wonders for your company. They are a great way to help establish credibility, built trust and give you an opportunity to prove claims about your product or service.

Customer testimonials help you convert more prospects into paying customers.

**Gordon Tan, Director – Client Heartbeat & R&G Technologies**



Here is a three step guide to customer testimonials:

- How to ask for testimonials
- What to ask for in your testimonials
- How to display your testimonials

## Step 1: How to ask for the testimonial

This is often the hardest step for many companies. In reality, it's the easiest. Neil Patel wrote an article on [how to effectively use testimonials](#) which has some great discussions in the comments. One reader asked, *but where do you find testimonials?*

Here are two ways you can ask and get more testimonials:

- Ask! Give your customers a call and ask if they would be happy to write a testimonial.
- Use [Client Heartbeat](#) – a tool that automates the testimonial gathering process by including it in the customer surveys.

## Step 2: What to ask for in your testimonials

So you've taken the leap and actually asked your customer for a testimonial. They then hit back with, *well what do you want me to say?*

Heck, some may even ask you to write it for them and send over for approval (these are my favorites).

Richard Tubb, former IT Business owner and now Business Coach, wrote a great piece on [customer testimonial mistakes](#). He goes through some great tips on being specific when asking for testimonials. Here's a bit from what he had to say:

“So it’s often the case that when we do pluck up the courage to ask for a testimonial, the customer will ask us “What should I say?”.

It’s at this stage you need to have a story in mind. If your customer testimonial simply says “Joe’s MSP are really good guys”, well, that’s nice – but it isn’t very compelling is it?



You should be asking your customer to specifically write about the benefits they received from your service. Testimonials with benefits make an extremely valuable sales tool.

Here’s a good example of a testimonial [R&G Technologies](#) received:

“We have been very impressed at the outcome of all projects, and have seen productivity increase and IT headaches drop dramatically”  
– Lynn Card, CEO of Xavier.

Note here the two big benefits R&G is pushing through this testimonial:

- Increase productivity
- Reduce IT headaches

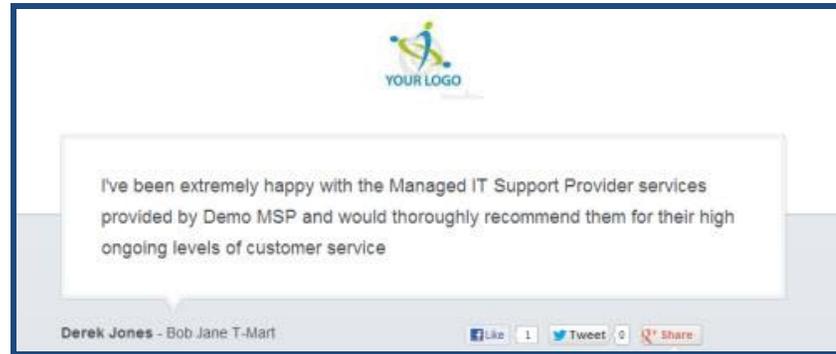
*Guess what – these two benefits are the focus of R&G Technologies’ marketing strategy.*

I also recommend building testimonials around your service and product offerings. So if you're a managed service provider, try getting testimonials around IT support, vendor management and on-site support.

### **Step 3: How to display your testimonials**

A good customer testimonial that is displayed in the right way, can increase trust in your company. When displaying testimonials on your website and in your marketing material, it's important to consider the three following questions:

- **Do you have a customer photo?** [Richard Tubb](#) recommends including a customer photo to reinforce the genuineness of your testimonial. Customer testimonials that don't have photographs are considered much less believable than customer testimonials that do.
- **Do you have a video?** Video is going gangbusters and video testimonials are something you should look into. Denise Wakeman talks about [using video testimonials](#) for more visibility on the web.
- **Are you using the right images/icons/graphics?** When you see a speech bubble or a quotation mark, you know it's a testimonial. When displaying your customer testimonials, make sure you follow these general guidelines. Learn more about the guidelines by reading this blog post on [five ways to display testimonials](#).



*Example Testimonial using Client Heartbeat*

If you're like me and find it hard to get testimonials, I recommend trying [Client Heartbeat](#). This tool can automate the testimonial process for you.

**Three reasons I recommend Client Heartbeat:**

- Easy to get new customer testimonials without lifting a finger
- You get the testimonials on publically accessible pages that can be shared with anyone, including your new prospects
- Inbuilt sharing functionality which gives you the ability to share testimonials via LinkedIn, Facebook and Twitter.

# 5 Ways To Get Customers To Send You Business Referrals

In today's world, your most powerful salespeople are no longer the one's you pay the big money to close the deals. You're most powerful salespeople are your advocates – your customers that are generating business referrals and positively raving about your business to their friends and associates.

These customers are helping you grow your business by drawing potential leads away from the dark mass of your competitors and towards your bright light of hope.

[Jeff Bezos](#), famous entrepreneur and investor once said, 'If you do build a great experience, customers teach each other about that. Word of mouth is very powerful.'

Researchers have backed up Jeff's thoughts with [research finding word of mouth](#) (WOM) has a greater impact on consumer behavior than traditional marketing methods. In other words, customers are more likely to listen to their mates recommendations, than a stranger on the web, TV or radio trying to sell them something.

Here are five rules you must follow to help generate business referrals:

## 1. Give customers a reason to refer you

It's an undeniable truth the person who cares most about growing your business is you. So why should customers care about generating you business referrals?

Customers feel valued when you give them the best products, exceptional customer service, and [blow their expectations out of the park](#). In addition, [researchers](#) have found interpersonal relationships between employees and customers are significantly correlated with WOM behavior. So if you build a rock-solid foundation of efficiency, empathy and good service with your customer, they'll trust you and want to help you.

The key here is to outdo the customer's expectation of you that it makes them want to recommend *you* to their network of peers as a solution.

"The first thing that needs to be accomplished is that the company needs to earn to the right to ask for a referral. If they aren't doing a great job, first of all they know it and second of all, the customer will never refer them out. Once that is accomplished, you need to just ask for a referral. It isn't as hard as many may think, but it needs to be done and done at least once a quarter."

- **Stuart Selbst, IT Business Coach** ([stuartselbst.com](http://stuartselbst.com))



## 2. Ask customers the right way

Many businesses know ‘who’ to ask, but they don’t know ‘how’.

The best way is to integrate the notion of referrals into your business relationship right from the beginning, so customers are already thinking about your best traits before you have to ask them. Then, once you’ve completed a job well done, you’ve build trust and know they are happy with your service, politely ask if they would know anyone interested in your services.

When asking for the referral, don’t limit yourself by saying, ‘Do you know anyone else who might want my product?’ Instead, reword your question and focus on the problems you are solving, i.e. ‘Do you know *of* anyone who has similar issues to you, which I can help with?’ Mention you’d be happy to reciprocate, and don’t be afraid of looking desperate.

**See also:** [Client Heartbeat](#) is a tool that surveys your customers, asks them for testimonials, and shares them across LinkedIn, Facebook and Twitter.

## 3. Resolve customer issues quickly

As soon as a customer notifies you of a problem, plead forgiveness. Then work tirelessly to fix the problem and send regular notices regarding progress to keep your customer in the loop.

According to Newell-Legner, 'It takes 12 positive responses to make up for one unresolved negative experience.' If you leave the problem too long, you'll have to work extra hard to repair that relationship. However, resolve the issue promptly, and that person will tell [4-6 other people about their positive experience](#).

If you want WOM, make every experience a positive one. Counter your customer's disappointment with out of this world customer service

#### **4. Use social media to generate business referrals**

[People trust friends and family](#) more than any other information source, and pay 2x more attention to recommendations that come from friends than other sources.' This is why social media platforms like Facebook, Twitter and LinkedIn are such an asset to your customer acquisition strategy.

Many customers would happily write a business referral, but don't know how to go about it. According to American Express, [48 per cent of Internet users](#) tell other people 'all the time' about a good customer service experience with a company. You can make these testimonies timeless by setting up a social media page and having them 'share' how much they love you with their friends. Not only does this provide you with a permanent, published list of written business referrals, you also get a throng of free salespeople selling your product for you.

#### **5. Remember to say thank you for every referral**

Always express your gratitude when a customer refers you new business. While it's true customers who refer you aren't looking for a medal, everyone likes to feel appreciated. A basic thank you letter, verbal thank you, or reciprocal referral is enough encouragement to keep people spreading the word.

[Maritz Research](#) found 85 per cent of customers were delighted to receive a public response to their comments on social media regarding a brand. Remember to stay in touch with these customers because you never know when they'll need additional services. It's basic stuff, follow through with every business referral, and contact your customer to say thank you to keep those new leads pouring in.

### **Referrals done right can fuel business growth**

Business referrals can be explained with this simple analogy. Customer service is like a steak. If you go to dinner and have the best damn steak you've ever had, you want to take your friends. Deliver the most exceptional service your customer has ever had the pleasure of experiencing, and no doubt you'll be seeing your customer's friends after the steakhouse.

CLOSING

# Why Customer satisfaction Is The Key To Business Growth

Customer satisfaction is a key factor in measuring the level of customer service you deliver. By focusing on improving customer satisfaction, your customers will become more 'delighted' with the service you are offering.

This results in happier customers that will continue to do business with your company, plus tell their colleagues and friends about your service.

These happy customer advocates then become the main source of new inquires for your business. Picture a world where you don't have to spend any money of marketing.

Well that world is a reality, as you continue to strive for high customer satisfaction, you in turn, create more customer advocates. That is the key to business growth.



# Client Heartbeat

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