BEST PRACTICE GUIDE

PERFECT THE CUSTOMER JOURNEY

TO GAIN COMPETITIVE ADVANTAGE



B2B Marketing

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Introduction

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Getting the customer journey right, and via this journey delivering a customer experience that drives loyal, meaningful and profitable relationships, is a big deal for brands. It's a source of competitive advantage, of revenue uplift, of an uptick in net promoter score (NPS) or customer satisfaction score (CSAT) and so much more. With so much of every customer journey now happening on, or being influenced by, mobile devices, app experiences and social, customer journeys are increasingly becoming full of micro-moments that make or break the customer experience.

Customer journeys are too often seen as, and delivered in, snapshots – the marketing, the sales, the service journey – rather than considered as part of a customer-centric strategy that transcends and transforms the entire organisation.

This is a view shared by many marketers today, so in this guide we will walk through the considerations, examples and practical steps you can take to gain competitive advantage from an integrated customer journey. We will expand on previous discussions around four key areas of consideration regarding the customer journey: data, consistency, collaboration, and technology.

I. Data

Many successful brands start their customer journey discussions with data – and rightly so – as it represents the foundation of what you're trying to achieve with the customer journey: understanding a full picture of who your customer is, and the context in which they interact with your brand over time in order to give them the experience they expect.

Innovation around data from a customer journey perspective falls into two main areas: a single customer view, and targeted cross-channel content.

1. A single customer view

This has long been the holy grail of delivering a personalised experience to customers. Now with the convergence of CRM, direct marketing, digital advertising and even ecommerce and customer service, the single customer view is not just richer, but is fast becoming the cornerstone of a successful customer journey.

For example, Kriti Kapoor, who leads HP's global social customer care team, says the integration of social, service and CRM: "Gives our social agents a comprehensive view of the customer before responding. They can instantly see the customer's history, their warranty information, other products they own, previous issues, open cases and more. The more data our agents have at their fingertips, the better the service they provide across channels."

For marketers looking at this area, I suggest:

Focus on customer data first, then enrich

Your CRM system, or wherever you hold your customer data, is where you will learn most about your customers and get most value – focus on this as the starting point and then move onto enriching it further with purchase data, social data, behavioural data and so on.

Think beyond marketing

Why advertise or market to a frustrated, unhappy customer who is in the midst of a customer service issue? If your organisation is focusing strategically on the customer journey, then consider how customer loyalty and service data can influence how you engage customers and ensure you are keeping them loyal.

Trust is more critical than ever

What data you collect and what you do with it should be top of the agenda for any marketer. With customers' ability to shift loyalty to another brand with the click of a button, and with the continuing importance of transparency about what data is being used, it is paramount to be clear with your customers about how and why you are using certain data. It's a fair exchange of value – they expect a great experience if they are to unveil information about themselves to you. Use data wisely and within the constraints in which you operate.

2. Targeted cross-channel content

Digital, social and mobile content will become a critical part of the complete customer journey in the near future as investment in social and mobile increases. This is fuelled by a rise in new social channels where engagement and user volume is high (think Instagram, Facebook, Pinterest, etc.) and where the maturity of identity-based platforms such as Facebook and Google is aligning with marketing tech and CRM. Marketers need to combine their data, social and content capabilities to get more from these new platforms.

I suggest you consider:

Combining anonymous and customer data to enhance customer acquisition and customer engagement

By using first-party data, such as customer email addresses, and combining it with anonymous behavioural data to deliver highly targeted content, marketers can achieve considerably higher engagement.

Enriching digital marketing by combining email marketing with social content

Email remains the ROI workhorse of most digital marketing efforts today, but as the customer journey becomes more connected, we are seeing innovative brands increase engagement by combining the content shown in an email with that shown on social media by delivering it consistently across these channels.

II. Consistency

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If a customer can research, register, buy, complain and buy again all on a single mobile device – and all within a matter of minutes – then certainly the consistency of message, experience and promise is what keeps it all together and makes the journey feel unified in their eyes. What's more, customer expectation is increasing exponentially as the channels of communication between customer and brand grow and become more intimate, direct and real-time.

As such, consistency is a critical discipline for marketers focusing on the customer journey.

Cross-channel consistency

Brands are increasingly finding ways to hold personal dialogues with their customers, and the rise in brands using messaging apps such as WhatsApp to do this, at least in the B2C space for the time being, is a case in point. Combine that with the more 'traditional' digital channels of email, mobile apps and social, and you've got a highly complex mix to deal with.

Key considerations in this area include:

Getting email marketing right first: Learn, then scale

Email marketing continues to be the best-performing channel for marketers. What you can learn from email marketing in terms of message, scale, response rates, engagement and more puts you in good stead for scaling up to mobile messaging, social, and any other channel to engage the customer. Use email as your learning ground and go scale.

In practice:

Sky has implemented SMS on top of email marketing as an additional channel to engage customers around feedback surveys for its technicians. It sends over 100,000 surveys per day and since implementing SMS has seen a 30 per cent increase in response rates.

Thinking of your service centre and your sales organisation as channels

As digital marketers and channel managers, we tend to focus our efforts on traditional and emerging marketing channels, but we don't often think of our service centre colleagues as marketing channels too. Imagine the impact of ensuring every follow up email from a resolved service issue automatically incorporated personalised content or offers based on current marketing campaigns, sent automatically by your service rep.

Consistency at scale

As channels increase, the number of campaigns grow and the need to respond at speed to customers accelerates. Accordingly, scaling your digital marketing presence needs to be one of your top priorities when investing in technology.

Here's an effective way to think about consistency at scale:

Ensure technology can support your growth

On 'Cyber Monday', Salesforce customers sent 2.3 billion emails in one day alone – a 44 per cent increase versus 2014 and a 77 per cent increase on the monthly average. Of course, this is the busiest time of the year for many brands, but these figures also highlight the considerable growth in outbound communications with customers. When you are investing in technology to support and scale your customer journey, ensure it can also support your plans for customer acquisition across the organisation.

Automate where you can

As digital marketing technology becomes more sophisticated, many of the operational and manual tasks a digital marketer once had to do can now be automated, leaving the marketer to concentrate on marketing. It's therefore wise to always consider (and action) the day-to-day elements of your marketing organisation that could be automated – from social campaigns and email campaigns to mobile app messaging and ads.

III. Collaboration

We're continuing to see fragmentation within marketing departments as specialist teams manage even more channels. This means the true masters of the customer journey will actually be those that excel at collaboration.

You should consider the following guidelines:

Start with getting collaboration right within the marketing organisation, then go beyond

The sophistication of marketing is bringing with it a rise in complexity of job titles, roles and responsibilities: twenty years ago there was no social team, and PPC was just beginning. This complexity is impacting collaborative relationships both within the marketing department as well as externally.

How can you combat it?

Collaborate around social marketing campaigns, including ads

Social marketing and advertising capabilities will continue to mature in 2016, as we see paid and organic campaigns blend together to form more strategic approaches to social marketing. However, many organisations are not geared up to take a coordinated and consistent approach to social marketing campaigns.

In practice:

A great example of collaboration around social media marketing comes from Bombardier, the aerospace and transportation giant. It brings separate social media teams together and optimises communication within one platform. More than 70 employees collaborate globally, monitoring their own business units' social calendars, while also viewing other teams' calendars for alignment and best practices.

'Social customer service' is where best-in-class collaboration needs to happen

Customers are disrupting the traditional, linear journey in an effort to experience faster customer service. Brands, waking up to this, are working to increase responsiveness and CSAT on social media channels in order to drive loyalty and customer experience. For instance, each month, nearly one million AT&T-related conversations are posted on Facebook and Twitter alone.

In practice:

AT&T's centralised social media team monitors Facebook and Twitter as well as other social media networks, identifies comments that require a response, and then ensures they are addressed. Actionable posts are converted into cases and routed to an appropriate subject-matter expert for resolution. As a result of having a centralised social media team, response times are down 70 per cent year-on-year and customer satisfaction is up five per cent, demonstrating the value of designing an efficient social collaboration model.

Organisations looking to focus their efforts around social customer service should consider these areas of collaboration:

Create a social engagement playbook

This document will show employees how to deal with social customer care issues step-by-step, how to manage the incoming traffic and where to direct it. Essentially, your playbook should show your organisation how to:

1. Listen to the right conversations
2. Flag and prioritise conversations
3. Classify conversations (product review, sales lead, industry discussion etc.)
4. Tag the source (tier-one customer, influencer, employee, competitor etc.)
5. Escalate the conversation if needed
6. Assign the post to the appropriate handler (sales, tech support, training etc.).

Monitor the right conversations, then engage and respond

Obviously, the foundation of customer care is to listen to customers, but from a social media perspective, listening to the right customers in the right places is what matters, otherwise you could be overwhelmed by noise. Here's what to listen to and monitor:

Brand monitoring

The first thing you want to do is see if there's conversation about your brand happening online. Hone in on search terms related to: brand names, seasonal campaigns, executives or stakeholders and specific products and services. Don't forget it's important to include related nicknames, misspellings, or abbreviations in your list too.

Industry monitoring

Focus on search terms that help you understand the larger landscape surrounding your business to determine where you fit in. It's wise to include: terms related to verticals you specialise in, phrases that define the markets you serve, larger industry keywords or categories, relevant professional bodies and industry thought-leaders.

Competitor monitoring

Keeping tabs on your competitors can provide vital intelligence about who they're hiring, how they're promoting their products and services in social media, and what their customers think about them. Armed with this knowledge, you can tailor your business strategies accordingly. Concentrate competitor monitoring on the same areas as you would for your own brand listening.

IV. Technology

There's no marketing without digital, there's no customer experience without digital and there are no customer journeys without digital. Technology has a significant role at every micro and macro moment in today's customer journey, and as marketers, it's critical that we understand and embrace technology as an enabler of creativity and innovation.

Technology needs to be a marketer's friend – to help us make sense of data and deliver across the channels that make sense for our customers. In future, I think we will see more of a holistic approach to connecting all these different stages of the customer journey with technology.

1. Ensure your marketing team becomes tech-savvy

Worryingly, research from Salesforce conducted last year indicates that only just over half of senior marketers view their relationship with the CIO, or other technology team leaders, as 'very important'. This number must increase this year as marketers continue to improve their stature as key stakeholders in the strategic technology investments CIOs are focusing on. Besides working on this vital relationship, CMOs need to consider how to make everyone in their team more tech-savvy.

Here are a few pointers on how to achieve this:

Improve relationships with tech teams at all levels

At all levels, the marketing and IT departments need to have a strong relationship where there is a mutual understanding of the value of collaboration around data and marketing technology. Additionally, IT teams can also support the bigger picture: integration beyond existing marketing technology may be able to unlock further value, as is the case with service and marketing integration around customer loyalty.

Get yourself a chief digital officer, if you haven't already

Organisations are increasingly creating a new seat at the boardroom table for the chief digital officer (CDO).

According to the CDO Club, CDO job titles increased by 205 per cent between 2013-2014. This position has become critical in creating the glue between corporate strategy and digital strategy, and merging them into one cohesive strategy that drives the digital transformation agenda. This is a crucial role, particularly for organisations that weren't 'born mobile' or 'born digital' and have to do some heavy lifting in terms of strategy and technology to connect and digitise the customer journey.

2. Go for cloud

These days most marketing technology is delivered via cloud computing. Research from Cowen & Company shows that, in fact, 77 per cent of organisations already report 'meaningful adoption of the cloud'. With this trend set to continue, it's important for marketers to understand the implications, for both the business and customers, of investing in the cloud and how they can leverage this to their advantage.

These areas make a good starting place:

Speed, scale and agility do make a difference for you and your customers

You'd think that speed, scale and agility are just terms that benefit the operational efficiency of your organisation. And they are. However, they also impact the customer. If you can respond to a customer faster than ever before (over social), how valuable is that to them? If you can onboard and welcome customers from all over the globe in a consistent and personalised way, how valuable is that? And if you can then quickly respond to events, market dynamics and trends, such as adopting new social channels where your customers are demanding you interact with them, how valuable is that? All of these capabilities can be vastly improved by delivering digital experiences through the cloud, so marketers need to understand the value it brings.

Cloud technology can unleash your creativity

If you've been using marketing technology for several years you may remember the days when it took forever to get the right reports and insights from analytics, delivering campaigns automatically across more than one channel took days, and optimising and testing content in email marketing was a significant undertaking. These days, however, technology can automate a lot of the manual tasks required for modern digital marketing much more efficiently and, as a result, we have more time to be creative – dreaming up campaigns, creating content, finding new ways of connecting with customers. We should embrace technology today as something that enables us to regain and revive our marketing creativity.

Key takeaways

Getting the customer journey right is absolutely key to gaining a competitive advantage.

It's possible to look at the customer journey in terms of four key areas: data, consistency, collaboration and technology.

Use data to develop a single view of the customer, focusing first on your CRM system, then customer service data. Remember your customers need to trust you and how you use their data.

Collaboration within the marketing department and other teams will allow you to master the customer journey. The best collaboration needs to happen on social channels, with a focus on effective social customer service.

Consistency is more important than ever – make sure everything about the customer journey is as consistent as possible, before thinking about how you will achieve consistency at scale.

Combine your data, social and content capabilities to produce consistent cross-channel content that will enhance the customer journey.

The effective use of technology is crucial if you want to achieve a seamless customer journey. There are two elements to think about here: ensure your marketing team becomes tech-savvy, and consider using cloud technology if you're not already.



Author biography

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Paul Smith is the general manager EMEA for the Salesforce Marketing Cloud. In his role he is responsible for defining and implementing sales strategies, securing reference wins, and building strong, scalable teams.

Prior to joining Salesforce, Paul served as MD for Techlightenment, a social technology business that enables clients to implement social commerce, social CRM, and targeted advertising campaigns.

With almost two decades of experience in the industry, Paul is often sought to speak at industry conferences and events, where he shares how brands can leverage social media to build better relationships with their customers.

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About B2B Marketing



B2B Marketing

B2B Marketing is the comprehensive information resource for B2B marketers. Its mission is to provide practitioners with the information they need to perform better and achieve more, whatever sector of the B2B space they are operating in.

Launched in 2004 as *B2B Marketing* magazine, it has since evolved into a multi-faceted resource, delivering a broad range of content in a variety of different forms and formats.

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