CUSTOMER EXPERIENCE
FROM STARTUP TO ENTERPRISE

*CX for every stage: How to scale
your Voice of Customer program
from startup to enterprise*

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TABLE OF CONTENTS

INTRODUCTION

YOUR BUSINESS GROWS.
GROW YOUR CX PROGRAM WITH IT.

Every one of your customers is taking a journey, a unique path of individual steps that form the customer experience. The goal of any company is to create the smoothest journey possible — one that leads to more conversions and more success for you and value for your customers.

Customer Experience (CX) programs built to improve this journey have become a critical component of business success. Fundamental to these programs is Voice of Customer (VoC) data — your customer's feedback about their experiences with and expectations for your products or services. Carefully monitoring your customer's satisfaction will help you increase retention, drive growth and address you customer's needs in a focused and impactful way.

A good CX program helps you *listen* to your customers, *learn* from your data, and *act* to optimize the customer experience.
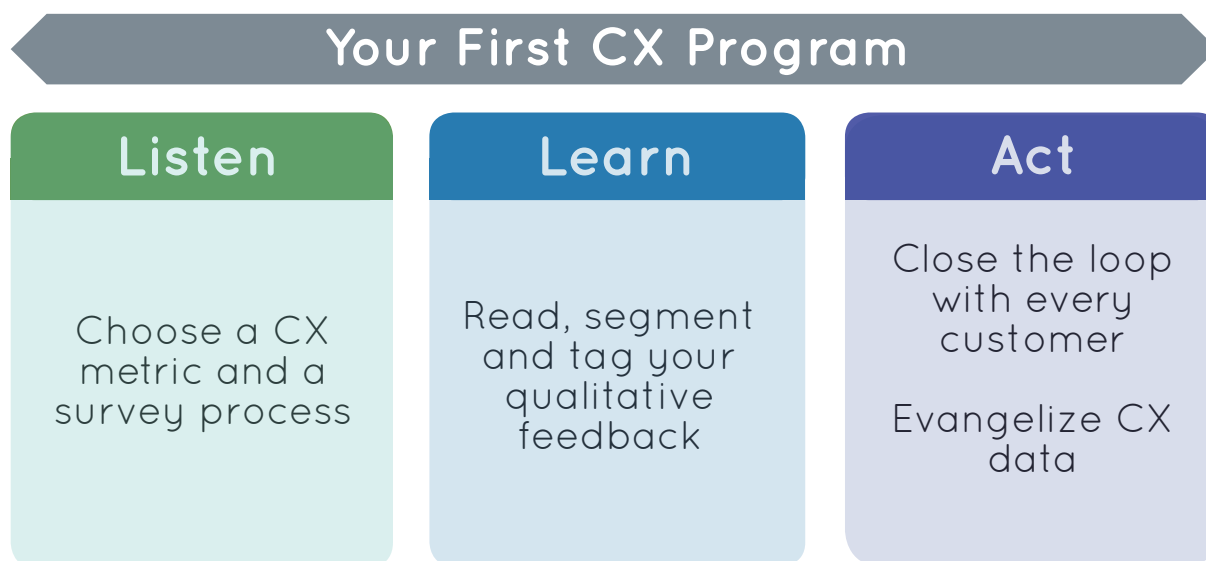
Listen   **Learn**   **Act**

This guide will help you grow your CX program along with your business and become a CX expert, whether you're just starting out or are a large enterprise looking to get the most from your data. CX experts today are using innovative technology like Natural Language Processing (NLP) to get insights from customer feedback in real time — this guide will tell you when to consider taking that step.

Chances are you're are looking for customer feedback software to support your customer listening effort. By looking ahead and envisioning elements of a mature CX strategy, you will be able to confidently choose software that meets your needs now — **and that can grow with you.**

GET STARTED ON THE RIGHT FOOT

Getting started with customer surveys for the first time is a key moment. Your employees may not be familiar with your new metrics and how your organization can leverage them, and your users will be seeing a survey for the first time. It's important to be thoughtful with each decision to get off on the right foot.

Your First CX Program

Listen	Learn	Act
Choose a CX metric and a survey process	Read, segment and tag your qualitative feedback	Close the loop with every customer Evangelize CX data

Building a CX-first culture will help you create successful, happy customers. The most important point at this stage is knowing that customer experience programs function best when the entire company is involved.

At a small company or early-stage startup, the CX champion is often someone in product, marketing or customer success. This person is your customer experience evangelist. It is important that this individual have a strong supporter in the C-Suite to make sure CX metrics get company-wide visibility, and to support the growth of a customer-centric culture at every level.

Your champion can form a "tiger team" of CX enthusiasts from across every department. They can coordinate responses across the business and make sure that you're meeting the needs of your customers.

Your CX champion is often tasked with finding **NPS software**, and it's important to assess your options. Choose a technology partner that offers a low or no-cost plan to kick off your program — and has the advanced features and consultation you'll need as you grow.

CHOOSE A CX METRIC & SURVEY PROCESS

Start by defining the goal of your CX program. Maybe your priority is to optimize your software product or to improve the support experience. Knowing what you want to learn will inform your listening strategy.

Begin With Net Promoter Score

Gone are the days of long, multi-question surveys. Completion rates are dismal. Today most companies pick a single question that will "metricize" customer loyalty or satisfaction, and then invite the customer to explain their score in their own words. These microsurveys garner high response rates that means you will hear more from your customer base.

There are a number of valuable metrics in the CX toolbox. Net Promoter Score (NPS), Customer Effort Score (CES) and Customer Satisfaction Score (CSAT) are three of the most popular and powerful surveys used to learn about the customer experience.

For your first customer survey we recommend you begin with NPS. Net Promoter Score is the gold standard for measuring customer loyalty and will give you immediate insight into your customers' stories, but you'll likely need other survey types down the road and we'll elaborate on options in a following section.

Choose Your First Survey Channel

You need to choose how you will survey your customers. Common options include email surveys, in-app surveys inside a web or mobile product, and SMS. Each segment of your customer base probably has a preferred method of communication.

Think about where your most important customers are interacting with you. If you're running a SaaS business, it's probably best to consider an in-product survey. On the other hand, if you have an e-commerce business, you might opt for a transactional approach such as sending an email survey a few days after delivery. Asking the NPS question via SMS is the way to go if you are an airline, utility or other business that communicates with customers on their mobile devices.

LEARN FROM THE CUSTOMER

Read Every Comment

When you're getting started, nothing can replace reading (and responding) to every survey response you collect. You'll stay closer to the customer and develop a holistic view of the customer experience.

Segment Your CX Data

Even if your company provides only one service or product, your customers are not the same. Categories of users have different needs and are bound to experience your company in slightly different ways.

Segmentation lets you see the NPS for particular user groups and determine how you're faring quantitatively. You're able to figure out whether NPS is being driven up by one segment and down by another. You then have the opportunity to make your product or service better for people in those precise segments that lag behind the curve. It's a powerful tool for prioritizing your efforts.

Identify Themes in Customer Comments

When you get more qualitative feedback than you can easily digest, you can filter your text responses for specific topics with tags. Tags are associated with keywords you want to monitor, and they allow you to easily track the Share of Voice (SoV) of a topic. How much are people talking about price, performance, delivery or a new feature?

Categorization will help you follow long-term trends, give you insight into a topic's trajectory, and let you know if you're addressing your customer's concerns effectively — or still need to do more.

At this point in your program, you may intuitively know what tags to use. In your feedback software program, set up text-match tags and you'll quickly be able to rank the importance of different topics by how much customers choose to talk about them over time.

CLOSE THE LOOP
WITH EVERY CUSTOMER

Close the loop, especially with detractors! Reach out via email or phone and address their concerns promptly. Passing your CX data to the system you use to communicate with customers — like Intercom or Hubspot — can make this easy. Customers will appreciate that you took the time to listen and respond. You may even turn a detractor into a happy customer.

Activate your brand promoters. When someone gives you praise in a survey response, ask them to write a review or give you a quote. These testimonials can be great ways to distinguish your brand from the competition.

If you don't have the resources to respond individually, write a blog post that summarizes what you've heard and actions you're taking and share it with your customers.

Intercom can be a powerful tool to close the loop and maintain a proactive customer success program!

Learn More.

EVANGELIZE CX DATA

Share feedback with the rest of the team. Now is the time to set up that Slack channel or forward a weekly NPS report via email. Seeing feedback in real time naturally helps everyone maintain empathy with the customer. You can share in the joy of the compliments you receive and together tackle the issues that detractors raise.

Take into account the unique ways every department can support the customer and benefit from CX data.

- The **Customer Success and Support teams** are passionate about shepherding SaaS customers through onboarding and ensuring customers see value. Customer Support is your first responder too — they can reach out and help every customer. They'll ensure you capture the benefits of customer surveys by addressing the customer's needs as they arise. They should be empowered to call for help from anyone in the company.

- The **Product team** has a new source of data for planning and product optimization. They can explore feedback to focus engineering efforts where they will improve the customer journey. The Product team should be ready to contact customers and get more detailed information.

- The **Marketing team** has a new way to learn how your product benefits the consumer, and a great source of testimonials and case studies for product messaging. Taking the time to read VoC comments can drive powerful new campaigns that would never have been considered!

- The **Sales team** can watch feedback to learn the customer's state of mind before the next renewal call, learn which features are resonating, and see which customers are ready for upsell

It's important to make sure everyone has easy access to CX information!

Create a CX Slack channel and encourage the entire company to join. Put up wall-mounted dashboards that put CX metrics front and center with the newest feedback and the latest scores — report it right next to other critical business metrics at the next company-wide meeting.

THE NEXT STAGE IN CUSTOMER EXPERIENCE

Taking VoC to next level means taking a more holistic view of the full customer journey. It means leveraging technology so you can still listen when comments number in the hundreds or thousands. It means more robust analytics.

You can begin combining surveys with other behaviors, and get concrete numbers on how your customers are reacting to different aspects or changes in your product or service. This will show you how CX impacts important metrics like product use, retention and sales.

Take CX to the Next Level

Listen

Capture information about the complete customer journey with new CX metrics

Learn

Use AI and natural language processing to categorize and analyze feedback

Combine CX and behavioral data

Act

Link CX data to business outcomes

Get data in everyone's workflow

Learn to close the loop at scale

Once you've learned how your customer is moving from their first touch to engagement, you can begin making data-driven decisions and acting in fast, targeted ways.

You'll also learn to use automation to interact with the customer faster and support more customers effectively.

"We have **dedicated resources** to **CX** at this stage because we are positioning ourselves for growth. There are other platforms out there -- we know that with superior customer experience will we maintain a competitive edge"

— *Amy Etheridge*
  Director of Customer Advocacy, MindTouch

GATHER FEEDBACK
ALONG THE CUSTOMER JOURNEY

By now you may have mapped you customer journey — and identified critical touchpoints that drive success. These include achieving first value, support interactions, and use of a new product or service.

Asking the right question at different steps along the path to success will help you build a better customer experience. Here are two trusted metrics that will take you beyond NPS!

Customer Satisfaction Score

Customer Satisfaction Score (CSAT) is the most popular CX metric for transactional interactions. A CSAT survey asks a customer how satisfied they were with a recent interaction like a support call. Use it to gauge how well these critical interactions are being handled.

For e-commerce sales, this survey is often used for post-delivery feedback on an e-commerce product purchase. SaaS product teams use a variation of CSAT called a Product Satisfaction survey or PSAT. It is often triggered in-app to solicit feedback that will help the product team optimize user experience.

Customer Effort Score

Customer Effort Score (CES) surveys ask the customer "How easy was it to___"?

CES is a CX metric used to improve systems that may frustrate customers. It is a popular metric to gauge satisfaction with support interactions. Customer Effort Score can also tackle a critical first step in the customer journey: **Onboarding**.

Onboarding — the first experiences of a new customer — is a critical point in the customer journey. A small hiccup can have a big impact, and losing a customer because of a challenging early experience is a painful and hard-to-discover problem. Customer Effort Score allows you to capture early feedback and discover ways to make sure the path to first value is smooth.

NPS, CSAT and CES work together as the foundation of a modern CX program.

Learn More.

GATHER FEEDBACK
ALONG THE CUSTOMER JOURNEY

By bringing CSAT/PSAT, CES and NPS into your CX equation, you'll have new ways to understand previously hidden parts of the customer journey and ensure every interaction is one that the customer loves!

NPS: RENEWAL
How is our relationship?

CSAT: SUPPORT
How satisfied are you?

CES: ONBOARDING
How easy was it to get started?

NPS

CSAT

CES

New customer journey begins

CONTACT
Lesley Customer

CRM Dashboard

RELATED   DETAILS

∨ Wootric Score

Current CES score		Last Response Date
6		12/12/2017 7:10 PM
Current CSAT score		Last Decline Date
3		9/21/2017 7:59 AM
Current NPS score		Promoter Level
9		Promoter

∨ Wootric Feedback

Date	Survey	Type	Score	Customer Feedback	Channel
03/15/2017 13:45	CES	Response	6	I got it done pretty quickly. Wizard could be smarter.	web
06/16/2017 14:19	CSAT	Response	3	Helpful, but was hard for agent to understand my issue.	email
12/12/2017 07:10	NPS	Response	9	Love you guys. Happy with the product!	web

zoom

Smartly integrated data was a big win with Wootric. To now have this customer feedback at the fingertips of every Salesforce user in our organization is HUGE!

Jim Mercer,
Customer Success at Zoom

A "Trifecta" view of the SaaS customer journey: Integrating CX survey data in your CRM of record.

CX is the cumulative impact of every touch point throughout the customer journey.

Learn More.

CUSTOMER INSIGHT THROUGH MACHINE LEARNING

In a survey from *Harvard Business Review Analytic Services*, only 23 percent of business leaders report they're able to act on all or most of their customer success data. When collecting thousands of surveys, large amounts of data collected become hard to address at scale, and text-match tags won't capture the wealth of information available.

To get to the next level, you'll need more advanced tools to extract the insights hidden in your data, such as Natural Language Processing (NLP), a form of artificial intelligence for real-time categorization and sentiment analysis.

Wootric's CXInsight will give you the power and insights of machine learning in one easy step.

Learn More.

Rule of Thumb
If you are collecting more than 1,000 responses a month, **natural language processing** will be a powerful force to uncover customer insight.
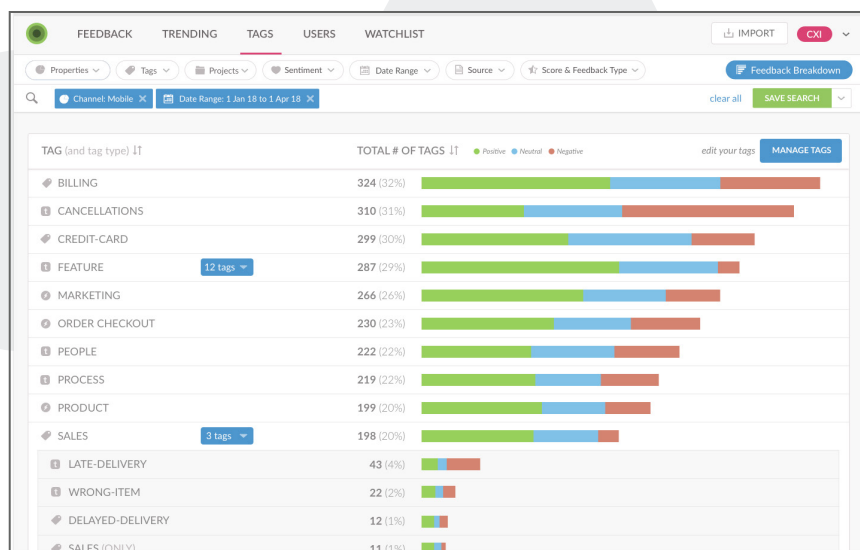
Wootric automatically categorizes feedback in real time to help you surface issues, prioritize product improvements, or route for follow up.

"For many businesses, the wealth of customer experience data has become overwhelming.

Artificial intelligence** gives us the means to retake the **initiative."

– Prabhat Jha
  CTO, Wootric

CUSTOMER INSIGHT THROUGH MACHINE LEARNING

Categorization in Real Time

Natural Language Processing is a collection of tools and methods that allow computers to interpret and analyze text data, and can help you recapture the initiative in your VoC program. Using NLP, CX data is auto-tagged as new topics arise. This brings issues front and center immediately, ensuring nothing gets missed and no customers get left behind.

Sentiment Analysis: Why Your Customers Love You, or Don't

Unlike traditional text match tagging, NLP can perform sentiment analysis. Not only is every topic tracked over time, but the tone and tenor of the customer voice is tracked as well — letting you know if your customers feeling positive or negative when they talk about a specific part of the product experience! You can learn how your business initiatives are impacting your customers in real time. This is a powerful step in VoC, leveraging the most advanced technologies.

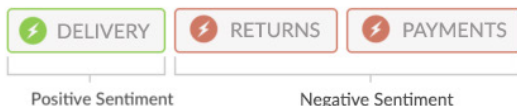### Analyzing Customer Feedback using Natural Language Processing

"I liked how quick the delivery to me was, but returning my order was a pain and I never received my refund."

Analysis

Categories and Sentiment

DELIVERY   RETURNS   PAYMENTS

Positive Sentiment   Negative Sentiment

Overall Sentiment

Mixed

Wootric's AI and sentiment analysis can take your CX program to **the next level**.
**Learn More with a Free Demo Today.**

LINK CX METRICS
TO BUSINESS OUTCOMES

As you gather more data you can tie CX directly to business outcomes by linking customer survey data directly to business metrics such as purchases, conversions, churn or sales.

Take a mobile app as an example — one awesome approach is to connect your CX data to your post-survey 90-day churn and see at what scores you begin to rapidly lose customers. Using NPS, you may find that you can tolerate some Passives, and perhaps even some 5 and 6 Detractors — but your 0s and 1s may be at serious risk of leaving soon if they don't receive the support they need to succeed!

We often see a chart that looks like this — the numbers are hypothetical, but the distribution is a common pattern.
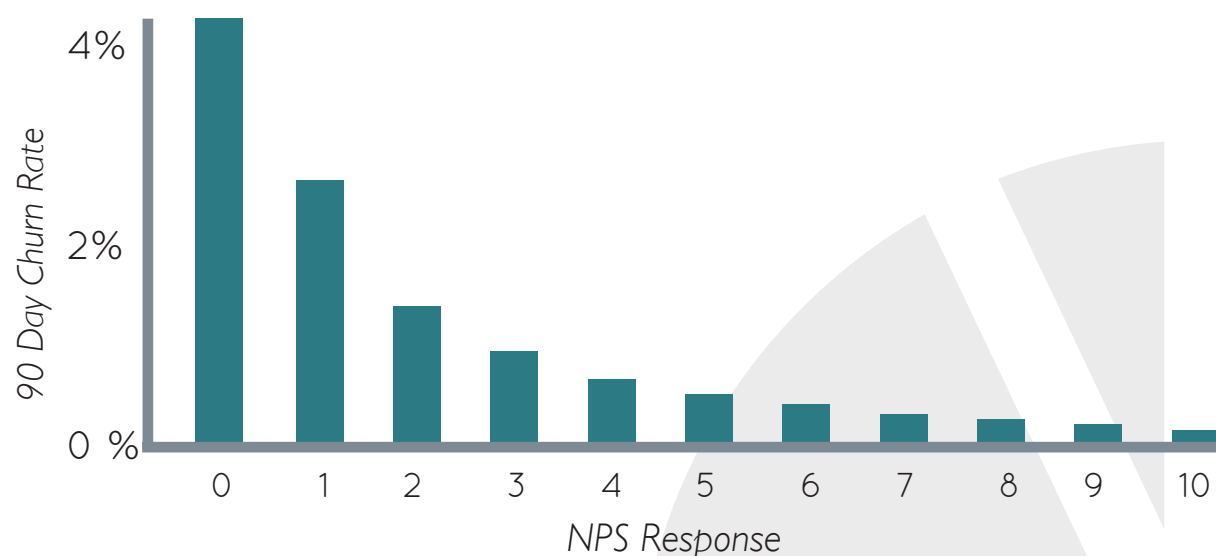
If you are a B2B business, you can factor NPS and other CX metrics into a **Customer Health Score** that also takes into account behavioral metrics such as the number of support tickets per user, usage of product features or other engagement metrics, and success milestones to monitor risk of churn.

DATA ACCESS & CX OPTIMIZATION

Get CX Data Into Everyone's Workflow

Stakeholders shouldn't have to search for VoC data. Sales needs to see CX metrics at the account level in Salesforce to prepare for an upsell conversation. Success may use Gainsight or other platforms for regular communications with customers, while Support is in Intercom or ZenDesk. Product may want the data in their analytics platform like Tableau. Analysts will want to be able to pull CX data into their relational database. All functions are able to drive better customer experiences and benefit from having CX data and analytics at their fingertips.

Connecting your CX program to other applications and software will bust silos and let you create powerful interactions to promote your business and delight your customers. Look for CX software platforms that have the native integrations and also open APIs that you need to make this seamless.

Wootric easily integrates with any database, CRM or analytics system, allowing you to connect your user data directly to customer success and perform advanced analytics.

Learn More.

Optimize Your Product With CX

When you collect CX data, you can see your customer's concerns in a clear light. Now you can perform the next step: product optimization!

Customer Experience often reveals areas of the product that can be improved, and using CX data you can rank and address the things that matter most. We recommend creating a dual-axis plan of attack. Look at the number of impacted customers and their average score for each issue, and combine it with a qualitative measure of engineering and operational effort required. This will help you maximize customer impact!

CLOSE THE LOOP AT SCALE

Taking action at the next level means going beyond personal callbacks. You no longer have the bandwidth to respond to every customer. Here are three approaches that represent different levels of engagement. Note that it's OK to take a hybrid approach, and most companies do. Think through what is right for your business — the most important thing is that everyone's feedback is acknowledged.

1. **High touch:** A customer success agent or account manager can reach out to their customers when they respond, even if just to say "Thanks!" This lets customers know you're listening and appreciate their feedback. For a B2B business, this is the way to go if you have the resources.

2. **Medium touch:** If you don't have the resources to personally contact everyone, segment the list by survey scores. Sync with a platform like Intercom to trigger automated messages, or schedule a weekly email campaign to each group.

   - Thank your **promoters** and possibly offer an incentive for them to take action as a brand advocate. For example, share their support on social media.
   - Route responses from **detractors** to success or support. Devote time into finding out more about why they aren't happy, especially those that didn't leave any feedback.
   - Consider an automated message to **passives** that didn't leave feedback. The goal here is to engage in a "What would make you LOVE us?" conversation.

3. **Low touch:** Respond with information-sharing and transparency. Consider writing a blog post or newsletter at the end of the month, summarizing the feedback you've received and stating your plans to address issues customers have raised. This lets your customers know that you're listening and that you have a plan to make their experiences better.

BECOME A CX EXPERT

By now you fully understand your customer journey and you're using advanced tools like NLP to automatically identify issues as they arise. It's time to take your CX to the expert level! This means experimentation, using new channels to get the customer voice to the right person in large organizations, understanding the math behind segmentation and pulling CX data into new types of models.

It also means moving to help the customer preemptively. To be a true CX expert, you'll need to understand the drivers of the CX experience and predict when customers might be struggling before they tell you!

Expert Customer Experience

Listen	Learn	Act
Test new questions Monitor all feedback channels	Use a CX VoC Command Center	Help customers preemptively Build mature routing

These CX tools are often employed by mature enterprises to maximize their CX program, but will **benefit everyone looking to be a CX expert.**

"Leading brands in CX start with a strong foundation in customer satisfaction. Understanding how to build upon it is what sets the best brands apart from the rest."

– Augie Ray
Research Director, Gartner

ASK NEW QUESTIONS & MONITOR ALL CHANNELS

When you collect thousands of responses a month or are operating at enterprise scale you'll run into new challenges and new opportunities. Here are some best practices to make sure you continue getting the most from your CX program.

Consider New Questions

Once you're collecting more than a few thousand responses per month, you have enough data to not only segment your customers, but begin to try asking new questions as well! This can be a powerful tool to gather data on specific customer needs, new product features or potential pain points along the customer journey.

For instance, instead of following up with a simple "Please explain your score," you might consider questions such as "What product feature would you like to see improved or added?"

This type of data can be a powerful way to get to the heart of pressing business concerns.

Monitor More Channels of Customer Feedback

CX pros know that today's hyper-connected customers are providing feedback whenever and wherever it is convenient for them. What are customers saying about you on social channels like Twitter or review sites like the App Store, Yelp or G2Crowd? These channels are an additional source of CX data.

*"It's so much easier when you can have all of the feedback come into one place. You can look at the **snapshot view**."*

- Sterling Anderson, Hootsuite

USE A CX COMMAND CENTER

Companies are inundated with Voice of Customer feedback that goes beyond survey responses — from support tickets to social channels to user interviews. And it's all over the place, siloed with different teams.

Expert CX teams take a systematic approach to aggregating and analyzing feedback to provide a unified VoC perspective that can guide improvements to customer experience.

A CX software platform that receives and analyzes all of your VoC data in one place, regardless of data source, can provide a single source of truth that you need. Use it to slice and dice the data for deep cause analysis. It can also alert you to new trends and anomalies.
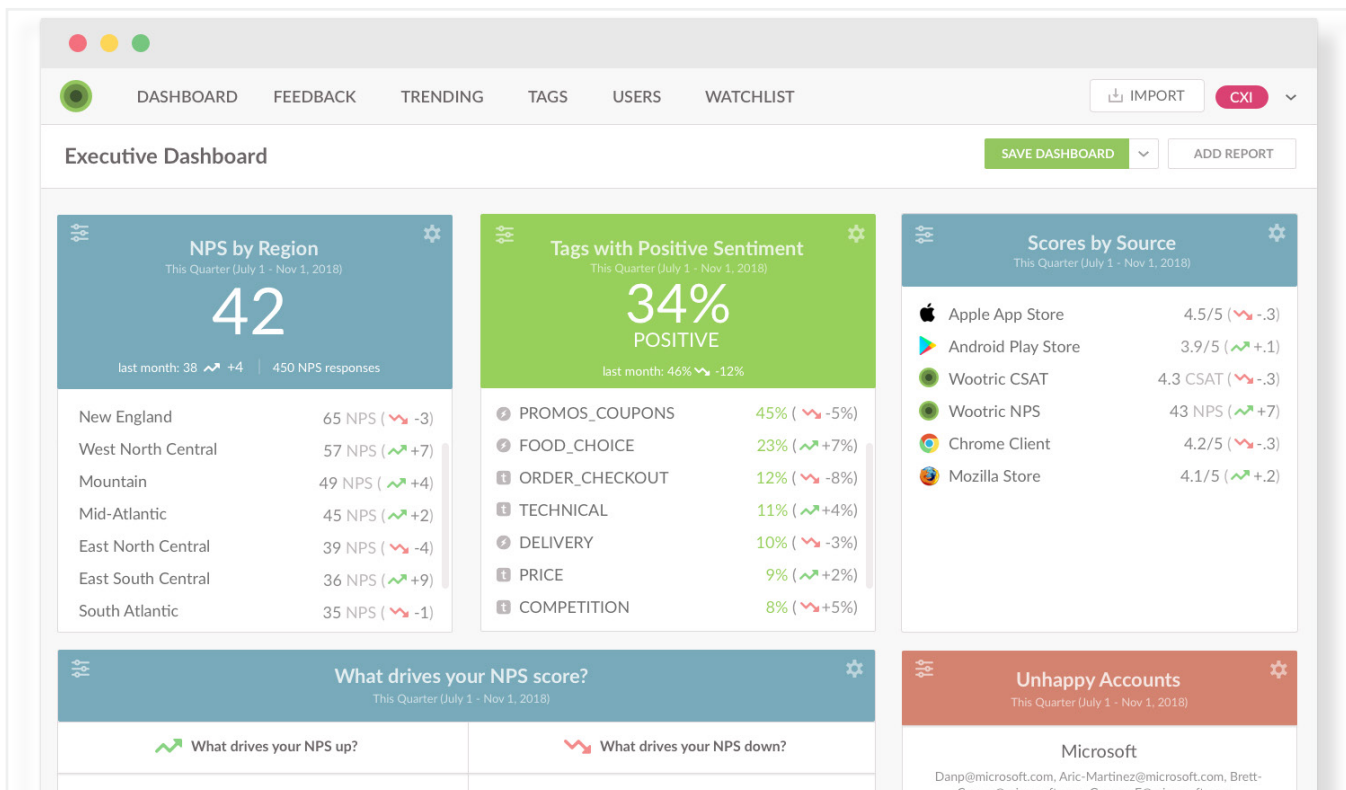
Wootric Executive Dashboard: (Examples)

PREEMPTIVE ACTION AND MATURE ROUTING

Help Your Users Before They Know They Need it

To be a true CX expert you have to move beyond reactive responses to preemptive actions. A company with an expert CX program will use the tools outlined above to anticipate the customers who might have a challenge.

For instance, through segmentation and modeling you might discover that a particular feature or event is associated with first-time users churning, and act to change your product to preempt that pain point. Perhaps you accomplish this by having Customer Success reach out to new users as they approach a stage, for example, triggering a reach-out to help customers when they reach that point or having support contact users through a chat window.

Build Mature Routing Systems for Many Stakeholders

If you're gathering new data about specific features or journey points in a large organization with hundreds of individuals interested in VoC, it's important to get data to the right people, fast. Self-serve capabilities are critical so that everyone is empowered to access data themselves, but you may want to build a more mature routing system so that people get the data they need automatically!

One of the best ways of tackling this is a weekly digest that uses tags to email the right people. For instance, the product manager for a feature can receive an email every Monday morning containing all the responses that mention their part of the product. This will ensure the voice of your customer is front and center during product development. At large enterprises, we've seen email digests going out to hundreds of individuals, and they quickly become indispensable to the organization!

CHOOSE A CX PARTNER
THAT CAN GET YOU TO THE NEXT LEVEL

It's important to continue to grow your CX program with your company and make sure you're taking the right steps to get to the next level. While the analytics become more complex, acting on the rich feedback and valuable insights will give you happier customers and more growth.

Modern technologies are helping companies make faster, more accurate decisions than ever before, and staying up-to-date will help you become and remain a market leader.

If you'd like to learn more about how Wootric can help you build a customer experience program that will succeed at any scale, contact us or click here!

Sign Up for Free   **Request a Demo**

ABOUT WOOTRIC

Wootric is the modern platform for measuring and boosting customer happiness.

Better CX feedback with high-response microsurveys. Wootric measures your customer experience using established metrics like Net Promoter Score℠, Customer Satisfaction (CSAT) and Customer Effort Score (CES), and customers explain their score in their own words. We reach out to your customers at the right time, in the right channel with the right question.

AI-driven insights in real time. Aggregate feedback from any source for theme and sentiment analysis in our advanced analytics platform. Comments are analyzed by machine-learning algorithms that are specific to your industry. CX professionals can tie scores to themes, see trends and alerts in real time, and filter data for cause analysis.

Align everyone in the company around customer experience improvements. The Wootric platform is flexible, lightweight, and connects to all of your other systems of record.

We share the latest news, innovations and thought leadership in the CX space on our **blog**.

Learn more:
wootric.com | **info@wootric.com**

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