Guide to nailing the

CUSTOMER EXPERIENCE

It all starts with clean data

"**Businesses have a lot at stake in 2016.**
Empowered customers are changing the
market fundamentals for virtually every
industry, forcing companies to reinvent
their strategy and operations."

-CLIFF CONDON, FORRESTER

IT'S BEEN A LONG, STRESSFUL WEEK.

You've traveled out of town for work, had back-to-back meetings, and now you're rushing through airport security to catch a flight home. Your stomach rumbles, but there's no time to grab a bite to eat. You'd give anything to have a fat juicy steak right now.

While waiting for take-off, you send a tweet to your favorite steakhouse jokingly asking that they deliver a porterhouse steak to your gate once you land.

Hours later, after a crowded and uncomfortable flight, your plane lands. To your total utter surprise, there he is, a finely dressed man in a tuxedo waiting for you in the terminal, holding a bag that contains a juicy steak, a side of potatoes, bread, napkins, and silverware.

This wasn't a dream but a reality for one lucky man and Morton's Steakhouse who fulfilled his wish.
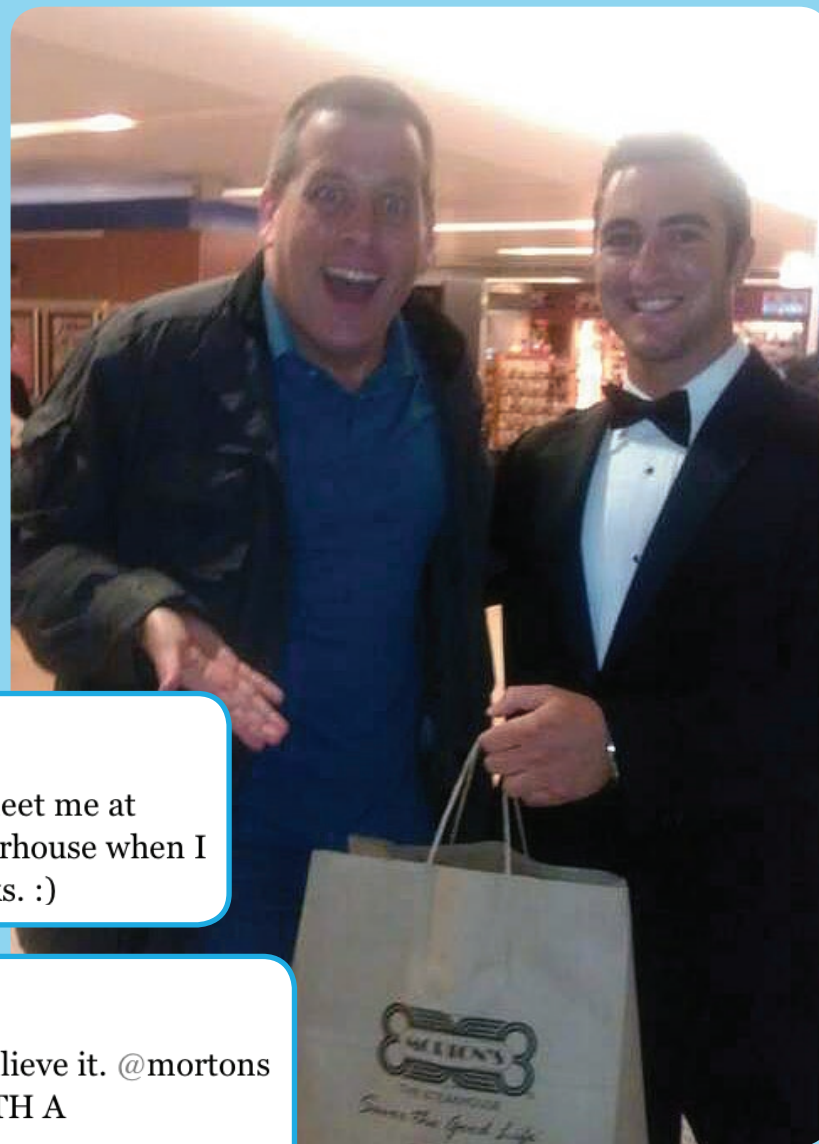
@petershankman
Peter Shankman

Hey @Mortons - can you meet me at newark airport with a porterhouse when I land in two hours? K, thanks. :)

@petershankman
Peter Shankman

Oh. My. God. I don't believe it. @mortons showed up at EWR WITH A PORTERHOUSE! lockerz.com/s/130578715 # OMFG!

SOURCE: GIZMODO.COM

THE DETERMINING FACTOR

Call this the times of "Me! Me! Me!" or blame it on Millennials, but according to experts, delivering a personalized customer experience will be the determining factor in who wins (and retains) customers in 2016.

Stop to think about how personalized the world that you interact with on a daily basis has become. Facebook acts as your individualized newspaper with stories and current events from friends. Gmail uses keywords in your email messages to interpret your interests and to show you relevant ads. Amazon uses your search history to remind you of what you considered purchasing, and tells those you know what others like you bought. The personal approach to customer experience is working.

Despite a steady decline in the soft drink market overall, soft drink giant Coca-Cola saw its largest year-over-year growth — more than 19% thanks to its Share a Coke campaign. The promotion distributed bottles with over 1,000 first name variations.[1]

1 SOURCE: USATODAY.COM

STEPS TO NAILING THE CUSTOMER EXPERIENCE

How can you deliver a personalized customer experience? Data. But not just any data. **Clean data.**

Get to Know Your Customers

Amp Up Your Data Quality

Respect Confidentiality and Privacy

Understand Your Data

Anticipate Customer Expectations

Location, Location, Location.

STEPS TO NAILING THE CUSTOMER EXPERIENCE

How can you deliver a personalized customer experience? Data. But not just any data. Clean data.

It's never been more crucial for companies to have current and accurate information about their customers' behavior, accounts, and preferences.

Good data can transform "Shelly Martin, married, two children" into "Shelly Martin, 38, homeowner, yoga enthusiast, frequent traveler, online electronics shopper, from Chicago, IL."

Having this kind of information will allow you to successfully target Shelly with relevant offers that are more likely to turn a one-time transaction into a lifetime customer. Good data gives businesses the ability to understand more, anticipate better, and gain a competitive advantage.
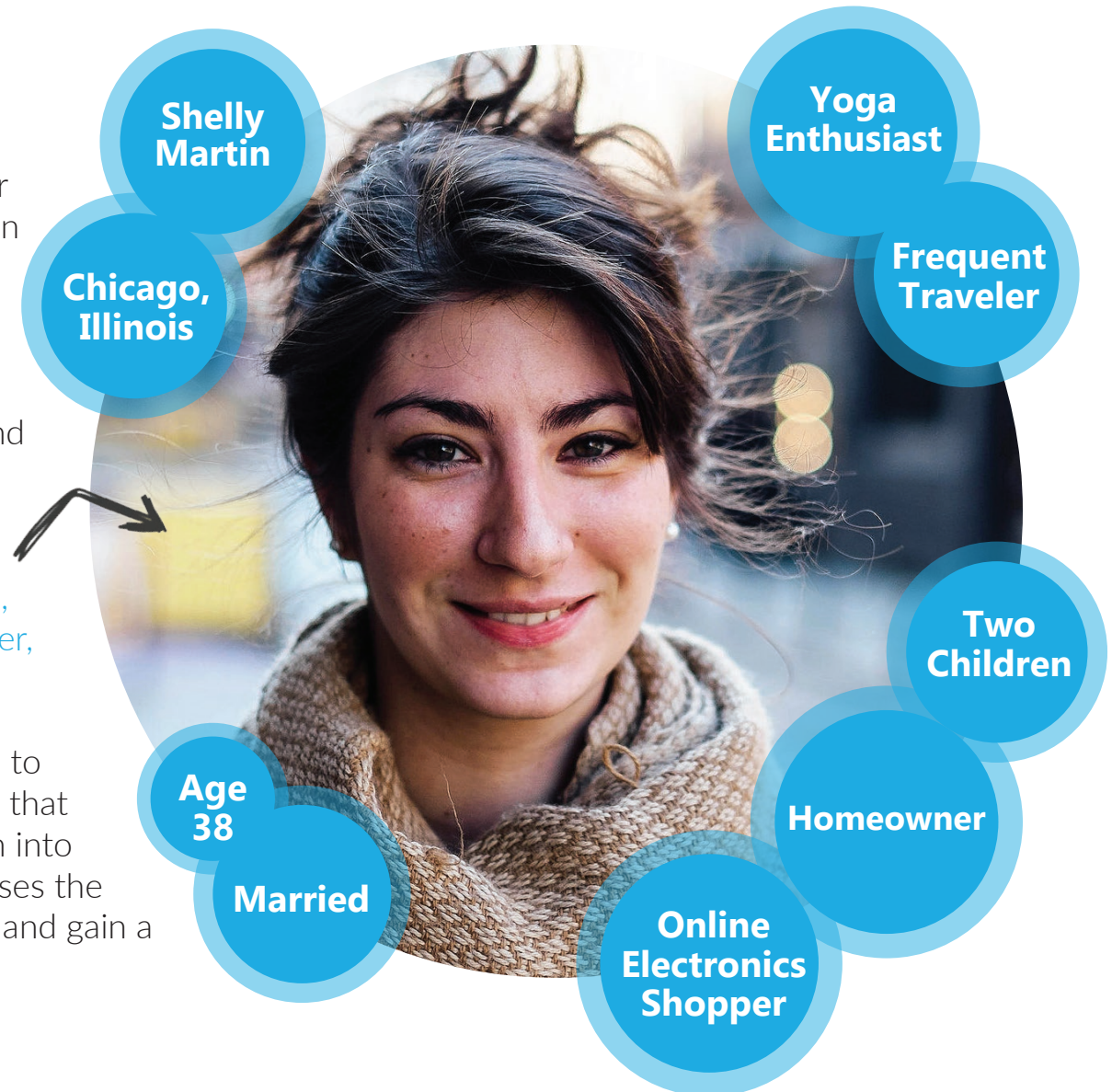
GET TO KNOW YOUR CUSTOMERS

Learning as much as you can about your customers is a critical aspect of delivering excellent customer experiences. When you have a complete 360-degree view of your customer base, you're able to deliver more relevant and personalized messages to your target market. You can better predict your customers' needs and preferences, and lessen the risk of frustrating customers and damaging your organization's reputation.

Consolidating all your data into a CRM, such as Salesforce®, instead of scattering information across multiple sources like a POS system, e-commerce, and an email platform will allow you to have a clear, concise picture of what's going on within your business.

86% of consumers will pay up to 25% more for a better customer experience.

It takes **12 positive experiences** to make up for one unresolved negative experience.

On average, consumers tell **8 people about good** experiences, but they tell **21 people about bad experiences.**

88% of consumers are less likely to buy from a company that leaves a **social media complaint unanswered.**

CASE STUDY

Boca Java, a gourmet coffee retailer, took advantage of the full profile of customer data that they had gathered, and more importantly kept clean, to personalize their marketing efforts.[1] Using their customers' purchasing behaviors, they were able to segment customers based on how many bags of coffee a customer had previously ordered – two, three, or four bags. All three groups were emailed a 17% discount on a three-pack of coffee.

The results showed that the segment of customers who purchased two bags were more likely to take advantage of the discount. With this information, Boca Java was now equipped with the insight to know which customers are more likely to respond to an upsell opportunity. But this realization would not have been possible without a way of tracking customer data in a clean and reliable way.

1 SOURCE: DMNEWS.COM

AMP UP YOUR DATA QUALITY

A single view of your customer base can only be accomplished with consistent, current, and accurate data. Organizations suffer in productivity when employees are forced to sift through two or more records that refer to the same customer.

For example, Andrew Thompson may be in your CRM twice; once as Andy Thompson and once as Drew Thompson. Referring to a customer by the wrong name makes them feel less valued and diminishes the customer experience. Even a slight misspelling, such as "Steven" instead of "Stephen," can leave a bitter taste in a customer's mouth. Imagine how detrimental it would be if your accounting department confused two duplicate records and mistakenly sent an invoice to a client at a 25% lower amount than agreed upon because they were unable to correctly identify which of multiple records had the accurate amount.

WHEN BAD DATA INFECTS

When bad data infects your database, you end up with a fragmented view of your target market and you miss out on opportunities.

Your sales team may mislabel a customer in the wrong stage of the buying process, they'll be unable to prioritize which customers are "hot leads," and they'll be unable to recognize and reward your most loyal customers. Marketing dollars get wasted on prospects that don't have buying authority when you're unable to segment customers based on their job titles, roles, and industries, and you waste time, effort, and money campaigning to contacts who are not realistic prospects.

Personalized Email Trends[1]

82% of consumers said that if they **were more relevant**, more emails could be sent to them **each week**.

80% of consumers who read promotional emails find it helpful when brands **recommend products based on past purchases**.

82% of consumers admitted they would **buy more** items via emails that had **better personalization**.

71% of consumers want recommendations based on **online browsing behavior**.

1 SOURCE: LISTRAK.COM

UNDERSTAND YOUR DATA

With analytics becoming another key competitive weapon in 2016, it's important that companies prepare themselves with clean data. Analytics give organizations the ability to understand, anticipate, and act on data that drives customer value, business efficiency, and growth.

CASE STUDY

Stanley Steemer, a residential and commercial cleaning company, integrated geographical data into their customer's profiles and discovered that out of their 300 corporate and franchises nationwide, their San Diego market saw the highest email open rates.

Because of their data gathering and analytic analysis, they were able to conclude that the San Diego franchise is close to its customers and sends out e-mails more frequently than other locations. At the same time, San Diego area customers had grown to expect to hear back from Stanley Steemer. Equipped with this information, Stanley Steemer could educate their other franchise locations on the importance of continual communications with their customers.

Data Points Marketers Use Most to Understand Customers[1]

- #1 Email Address
- #2 Name
- #3 Location
- #4 Demographics — Age, DOB, Gender, etc.
- #5 Internet Cookies
- #6 IP Address
- #7 Social Media ID

ANTICIPATE CUSTOMER EXPECTATIONS

Customer expectations are at an all-time high and consumers today are not willing to wait around for an answer. They place more emphasis on faster response times than they do on learning about products and services. Failing to respond to a customer's problem today can have a negative impact on your company for years to come. According to statistics, you could risk almost half of your consumers switching to a competitor following a delayed or poor customer service experience.

Imagine that Anna, a valuable customer, calls your technical support hotline to follow up on an ongoing issue. Shelly, a member of the support team, answers the call and pulls up Anna's profile but comes across two instances of Anna's account in the CRM. Frustrated, Anna must once again explain her issue, wait on hold while Shelly tries to figure out which record is correct, and transfer her to the right account manager.

47% of consumers say the most important element of a positive experience is **fast response to inquiries or complaints.**[1]

A reliable way to ensure that you're equipped to handle your customers' high expectations is to always make sure that your data is clean, reliable, and up-to-date. Having duplicate records present in your data delays your ability to quickly solve problems, and can make your employees look incompetent in the eyes of your customers, as the example with Anna illustrates. Plus employees will lose confidence in the data itself and in turn become less likely to utilize the CRM you've invested a lot of time and money in.

LOCATION, LOCATION, LOCATION.

Location-based information can also help complete the picture of who your customers are. By knowing their location you can help answer which of your stores or your competitors' stores are closest to your customer, or you can better divide sales territories.

Enriching and augmenting data further empowers businesses to quickly meet the demands of customers. Making sure mailing address are verified helps to reduce shipping delays and gets products to clients quicker. Verified addresses help to save money on postage by eliminating undeliverable or incorrect addresses. Standardizing addresses helps to correct misspellings and fill in blanks where data is missing, like city or zip code.

Do your targets live in an affluent area?

What's the population density and demographics?

What's the weather like where they are and does that have an impact on their behavior or on the products and services you sell?

RESPECT CONFIDENTIALITY AND PRIVACY

Recently there have been a handful of well-publicized security breaches, identify theft schemes, and socially devastating privacy violations. Customers now place high priority on how well privacy and personal information are managed, and are more willing than ever to walk away from your business if you fail to protect their data and privacy.

More than 90% of consumers in the US and UK are concerned about data privacy and how companies use their data.[1] If you mistakenly confuse one customer for another, not only will you leave a bad impression, but customers will lose confidence in your ability to manage and protect their information.

57% of cloud computing users feel that the cloud actually **increased their security** when compared to traditional methods for computing and data back up.[2]

CONCLUSION: PRACTICE GOOD DATA

It's clear that in order to excel in delivering an outstanding customer experience you must have clean data. High-quality data serves as a solid foundation for success, enabling better business decisions. When the quality of your data is low (incomplete, duplicated, old, outdated) then business operations are of a low quality, ineffectual, and ultimately costly.

Managing and maintaining high levels of data quality has across-the-board positive impacts on business.

Good data breeds efficient and effective sales and marketing. Reps don't have to struggle to find critical information. From a marketing perspective, resources can be better targeted based on accurate metrics and analytics.

Perhaps most importantly, good data is a necessary requirement for ensuring a good customer experience, whether your customers be individual consumers or other businesses.

DATA QUALITY BEST PRACTICES

There are some simple but critical techniques to employ in your data quality strategy.

Deduplication

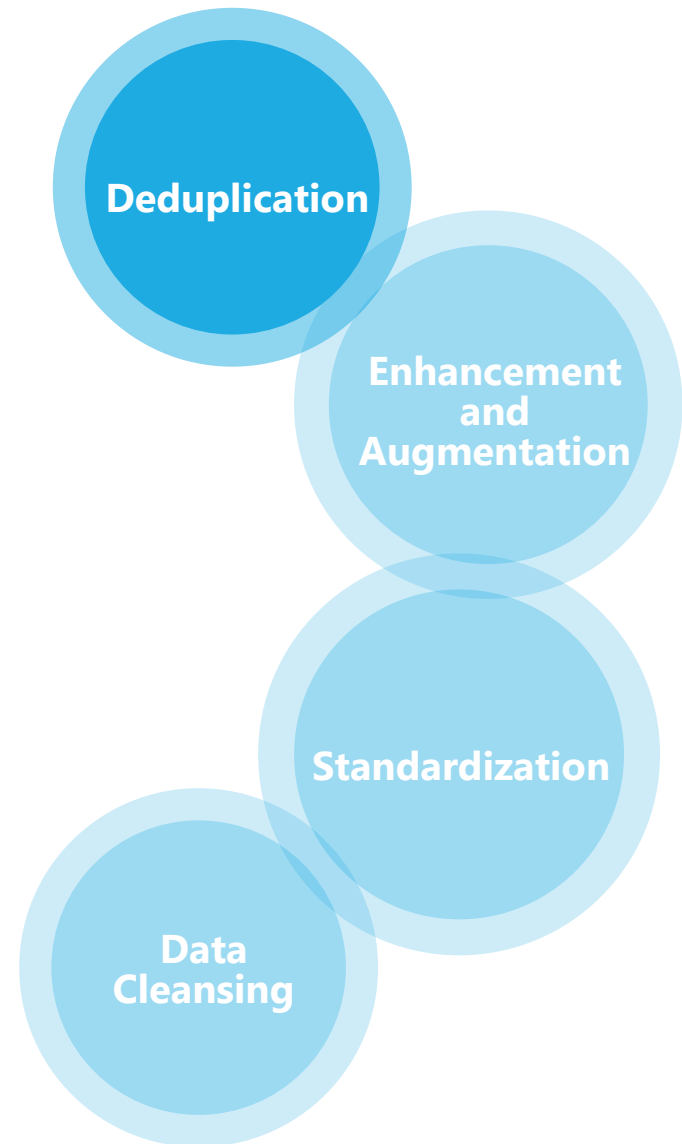**Enhancement and Augmentation**

Standardization

Data Cleansing

DEDUPLICATION

Duplicate data is the main source of poor data quality. With duplicated records, reporting suffers, sales and marketing suffer, and the efficiency of IT operations suffers.

Decide on a deduplication program that has the flexibility to analyze duplicate matches from a variety of angles and based on a variety data points. Ongoing deduplication must be quick and easy to accomplish, and it must be able to maintain clean data on an continual basis as data changes.

Deduplication

Enhancement and Augmentation

Standardization

Data Cleansing

ENHANCEMENT AND AUGMENTATION

Half-completed data sets are not valuable to you or your mission. Use a service that can validate that the data you have is accurate and actionable as well as enhance that data by filling in any missing pieces. Correct mailing addresses, phone numbers, and email addresses are invaluable to your end goal.

Deduplication

Enhancement and Augmentation

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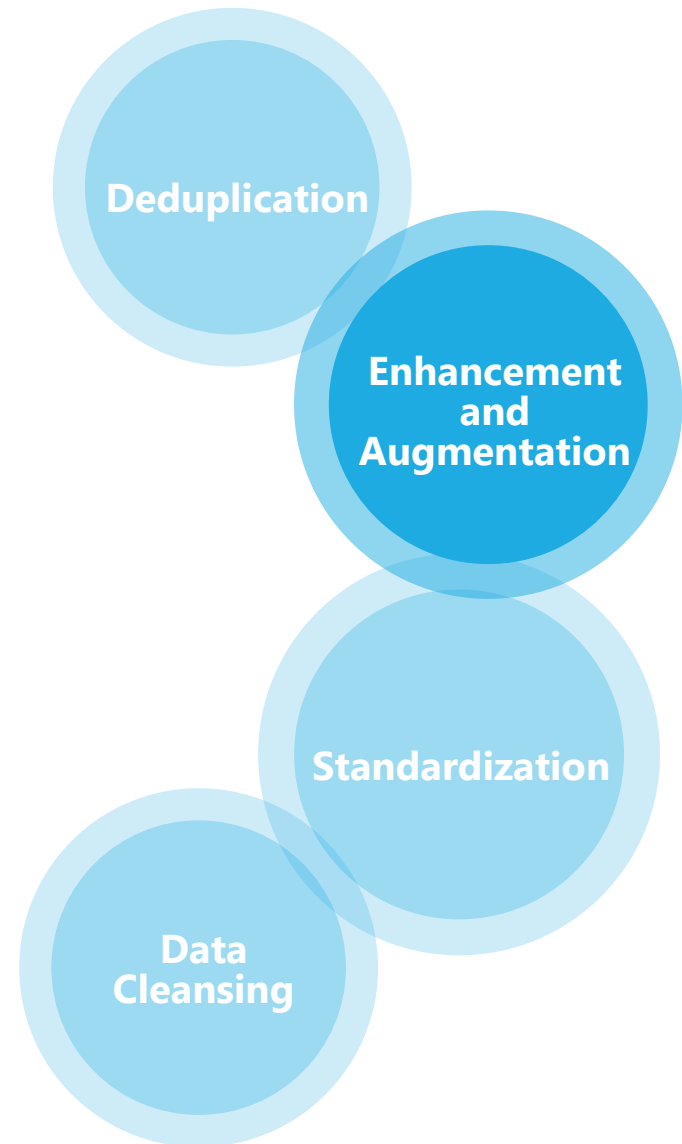
STANDARDIZATION

Evaluate how you collect data and establish policies for how data should be maintained. Determine what information is important to your organization and ensure that all employees are collecting the data in a uniform way.

For instance, when learning of a client's change in title, put a procedure in place that the record must be updated immediately, for example by checking the "former employee" tick box.
This simple policy will allow your team to be more focused in campaigning because they won't be wasting time sending emails to accounts that have been disabled or calling phone numbers that have been disconnected.
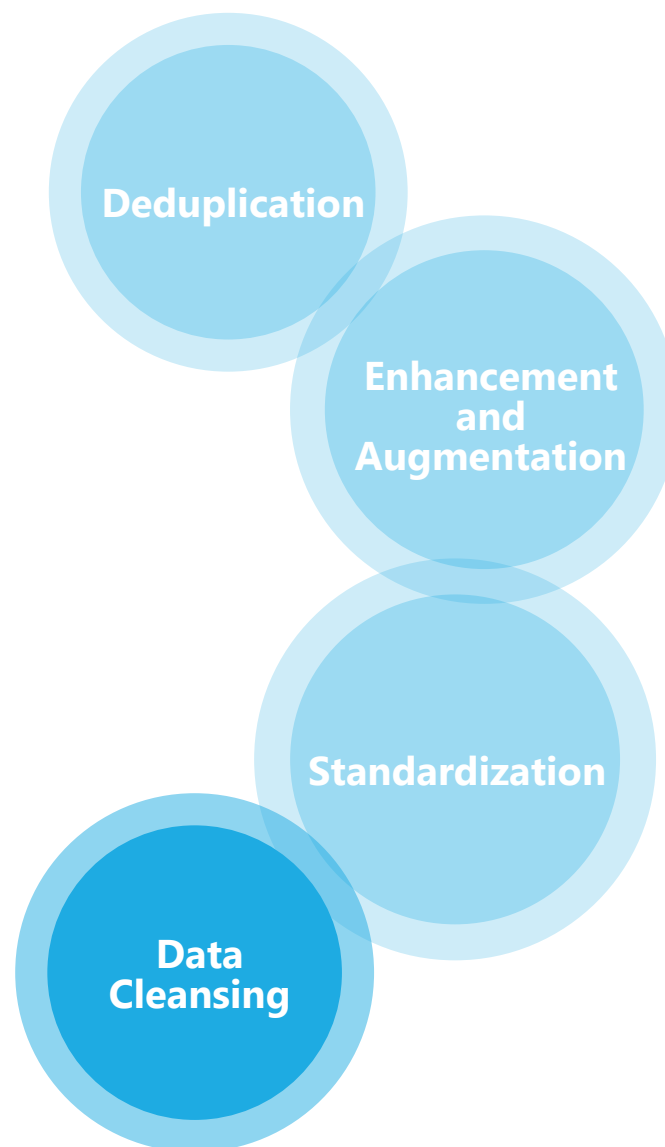
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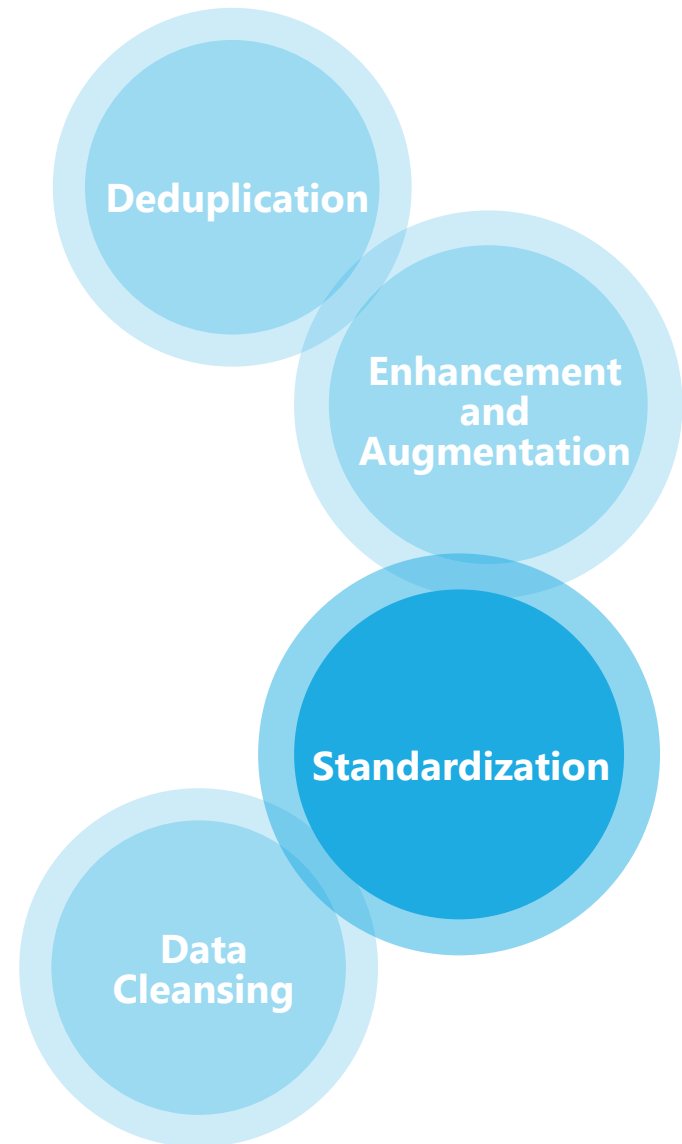
Data Cleansing

DATA CLEANSING

Consider the value of your data. Think about how much time and effort went into just collecting the data. Even if it's in bad shape, it still has value.

For example, say you have five leads for William Franklin but none of them has a complete set of info. What if you put them all next to each other? Maybe three of the five have the same phone number and one has a description that isn't present on any of the others. If you combine them into a single record, you now have a more complete set of data points for William Franklin. In addition, you now have one single record that can be enriched with additional data points.

Consider using tools and services that can profile current data for completeness and accuracy. Data cleansing can tell you what data you have and what you're missing. It can also verify deliverability of physical addresses and email addresses, and can confirm phone number accuracy.

Deduplication

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cloudingo™

DELIVER A SUPERIOR CUSTOMER EXPERIENCE

Start by cleaning your Salesforce® data with Cloudingo -- voted a must-have app by Salesforce admins.

✓ Prevent and eliminate existing duplicate records

✓ Auto-Merge, mass merge, or manually merge duplicate records without losing important data

✓ Mass update and mass delete records

✓ Geocode, validate and standardize addresses

✓ Cleanse import files before the data reaches Salesforce®

✓ Use prebuilt filters or easily create your own

✓ Easy to use drag-and drop user interface

Get a Free Data Health Check
START A 10-DAY TRIAL

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