



# The Ultimate Guide to Customer Service for Industrial Manufacturers

Keeping Your Customers Engaged and Happy



# Improve and Optimize Your Relationships with These Customer Service Best Practices

Customer service is a rapidly evolving discipline that plays a major role in the company’s long-term success. Given the proliferation of choices, wealth of information, and growing demands that buyers have these days, companies have no option but to adapt to the changing consumer needs by providing excellent customer service. In fact, according to a [study by Walker](#), by 2020, customers will value experiences more than prices and products, and 86% of shoppers will spend more for a [better customer experience](#). So, it’s not a question of whether you should focus your company’s efforts on improving your customer service program, but rather how to make your customers happy by exceeding their expectations—in turn, having them become your business’s biggest advocates.

**In this customer service guide, we’ll cover:**

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Before diving in the strategies that will help you to improve your customer service, let's look at what has changed in the field.

## How Customer Service Has Changed

We don't do business the same way we did 10 years ago—both in B2C and B2B sectors. As business models change (marketing, buying, selling), so does customer service. The changes are especially apparent in the eCommerce industry, but as we see with other buyer trends, it eventually permeates the B2B customer environment—and it has already begun. Although B2B companies still rely on the power of personal relationships their salespeople have developed with clients over the years, the [latest research done by Accenture](#) shows that nearly half of the B2B leaders surveyed plan to implement online-only loyalty programs, and 35% of the total will offer online training for both internal teams and customers. Undoubtedly, [customer journeys have become more complex in the recent years](#), and B2B purchase paths are more sophisticated with various touchpoints—both online and offline. At the tip of this iceberg, 61% of all B2B journeys start on the internet. With so many advancements taking place, in what ways has customer service changed, exactly?

### 1. The Compounding Effect of Customer Happiness

Dedicated customer service plays a critical role in customer happiness. Not only do your happy [customers continue to do business with you](#), but they also attract new prospects by spreading the word and sharing their positive experience with others. On the other side of the coin, bad experiences travel even further among your customers' network, negatively impacting your reputation. The worst is that it discourages others from interacting with your business, without even giving you an opportunity to prove yourself to them. You could be losing business that you don't even know about!

Given the rise of digital and social media, positive and negative views spread especially far these days. That is, the level of customer service received by one of your customers affects not only their view of your business, but the view of their closest network, having a trifold effect on your future sales. With customer interactions more public, the need to invest in sustaining and nurturing existing customer relationships is critical. Your effectiveness at reducing customer attrition and growing a base of outspoken advocates will determine the long-term success of your organization.

60%

of consumers have stopped doing business with a brand due to a poor customer service experience

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Microsoft State of Global Customer Service Report, 2016



## 2. New Customer Service Channels

Some of the oldest and most common customer support channels have been around for decades: phone, email, and on-site support. However, there are other channels that have emerged more recently and are already equally, if not more, important for customer interactions.

### **Live Chat Customer Support**

Live chat customer support allows website visitors to message a business's customer support team. Customers can get the assistance they need without dialing in on the phone or waiting for a response back via email—saving themselves a significant amount of time. More and more companies are implementing the live chat function as its [popularity increases among customers](#).

By assisting customers in real-time through the live chat function on your company's website, you show customers that you value their time. When customers feel that they are cared for, it's more likely that they will share positive experiences with your company, and this will build a stronger relationship between you and the customer.

### **Chatbots**

Not every company has agents available online 24/7. What can you do to meet the needs of your current and potential customers surfing the web outside of (and even during) business hours? Customer care bots, or chatbots, allow companies to have 24-hour, automated replies that can instantly help website visitors find an answer to a general question, ask about their existing order, or request a new quote. Although still relatively new, chatbots are a quick-and-easy solution for offering simple answers to common questions, converting visitors to leads, and offering a smoother journey leading to a purchase—all for a very small cost, if any. According to a [CNBC report](#), chatbots could cut business costs by \$8 billion by 2022.

Chatbots are not meant to fully replace human interactions, but they are a great tool for handling repetitive tasks, such as form submissions or database searches. When chatbots aren't implemented with a strategy, they can feel clunky to people used to real-life interactions. To avoid this, it's important to program chatbots with your brand's voice and customer persona in mind. Expect chatbots to keep growing and evolving.



## Social Media Growth

While B2B's more acute focus on social media is in its early stages compared to the B2C sector, it's clear that the rise of digital commerce will inevitably lead to capitalizing on opportunities via social channels such as LinkedIn. Given that [half of online research on companies starts on social media](#), it won't take long before customer service via social media channels becomes a new must-do, regardless of the industry you are in.

# 88%

of marketers say customer service on social is important to their brands

Sprout Social Index 2018

Social media has become [a new channel for customer interactions](#), and there is a good reason for that—about 80% of consumers have shared positive experiences with companies on social media, according to [this HubSpot survey research](#). Public interactions with brands on Twitter, Facebook, and Instagram let customers get fast and easy responses while allowing companies to be more connected to their customers in a less stringent way.

## 3. New Customer Service Metrics

The increasing number of service channels and various touchpoints create more meaningful interactions. But this also creates a need for more relevant metrics and analytics to understand the value of customer engagement. For one, companies are now placing even greater importance on metrics like Net Promoter Score (NPS is an indicator of a customer's loyalty to the company) to quantify the return-on-investment in delivering online support and turning customer requests into product improvements.

Hello

Your opinion matters

**How likely is it that you would recommend -company- to a friend of colleague?**

0 1 2 3 4 5

Not at all likely

Extremely likely

With various customer touchpoints and the increasing importance of lifetime customer happiness, it's no longer possible to effectively measure the success of customer service by looking at operational metrics, such as average handle time or cost to serve. The shift is more meaningful and customer-focused. What we are seeing today is the move from metrics that are limited to how an agent processes a complaint to the ones that measure customer happiness and how likely they are to do business with the company in the future. Service metrics are undergoing an [evolution of their own](#) and that evolution is headed towards focusing on customers' experiences across their entire lifetime with a business.



## 4. Evolving Customer Support Software

Companies are adopting newer technologies to keep up with growing demands of customers.

By having the right software, businesses can:

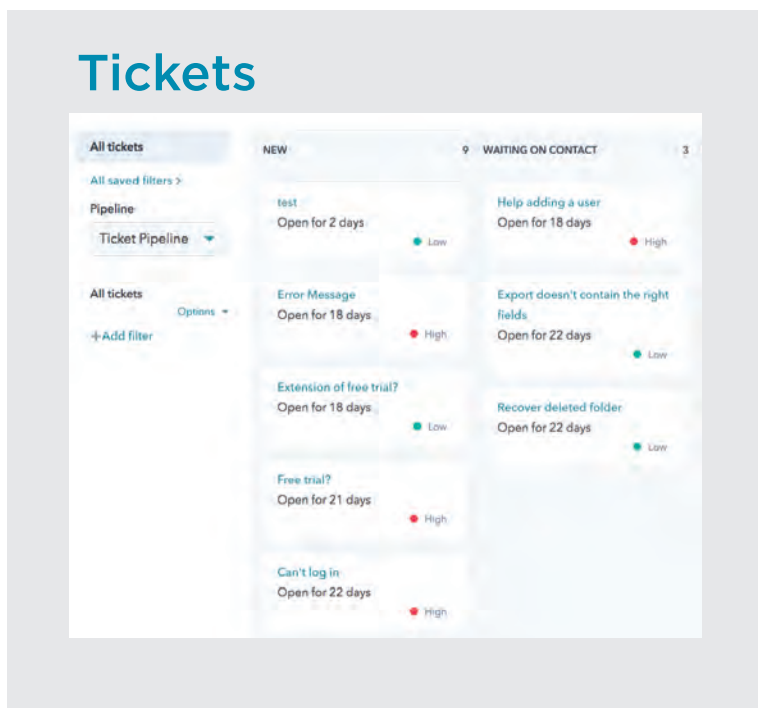
- Automate manual processes
- Manage and share information about customer interactions
- Collect customer feedback
- Use time and resources more efficiently

Below are some of the must-have tools to help ensure consistency and foster successful relationships with your customers.

### Tickets

As earlier mentioned, there are a number of ways your customers expect to be able to reach you at their own convenience. Managing those interactions coming from different places can become hectic, especially if your customer service team members have to reach out to different people within the organization for more information. Ticketing is a system that helps companies track and organize incoming customer requests all in one place. It's an effective way to keep on top of all customer interactions, prioritize workflows, and resolve issues thoroughly and efficiently.

Additionally, most of the ticketing systems available today come with built-in reporting and analytics. You can use this valuable information to see what kind of requests are time intensive and optimize your processes to better allocate customer service resources. As well, the insights often shed light on various topics that you can educate your customers about, thereby using your team's time and energy more efficiently. Finally, your product, marketing, or sales teams can also benefit from a ticketing system when insights—and oversight—are shared with every department.



## Customer Feedback

Customer feedback is one of the most valuable sources of information for the long-term success of any organization. By collecting customer feedback, you can learn more about your customers and what drives customer satisfaction, as well as identify ways to improve your offerings and create a better customer experience.

When it comes to capturing customer feedback, to be able to see a true picture of what your customers think of your business, you need to be consistent. It's imperative that you ask the same question at set intervals over time to have accurate tracking of customer satisfaction. An automated customer feedback software allows you to simplify a consistent process of feedback collection. With feedback software, you can:

- Gauge customer loyalty through the use of Net Promoter Score surveys
- Assess overall customer satisfaction at different points in the customer journey process
- Get feedback on the helpfulness of individual support received

Additionally, customer feedback software, such as [HubSpot's](#), provides an analytics dashboard so your whole team can monitor changes in customer satisfaction over time. This allows for better reporting and promotes an action-oriented approach to create an even better customer service strategy.

## Knowledge Base

If you ever worked in a customer-facing environment, chances are you were asked the same questions repeatedly. While answering repetitive questions is a must, productive use of employee' time is at least equally important for any business. Building a robust knowledge base made of helpful articles and documentation that answers your customers' most common questions is another way to save your team's time and resources while satisfying the need for immediate customer queries.

By turning your customers' most frequently asked questions and tickets into a self-service knowledge base, you provide them an autonomous channel to answers without your team's immediate involvement. In short, a knowledge base serves as an organized library of information about your products, services, business, and any other information you feel is important for your customers to know. Your knowledge base can house whitepapers, infographics, videos, eBooks, FAQs, and other resources for your customers in one easy-to-navigate location. Often, knowledge base software can also be integrated with chatbot functionality, doubling the benefits of both of the tools.

Another tremendous benefit of having a knowledge base is the ability to find out where you might be lacking in information that customers and prospects are looking for. If you get repeated queries for subject matter that is not at all, or insufficiently, supplied via the knowledge base, you will find out quickly that you need to update your knowledge base to include it.





## Chat Software

As it was mentioned before, live chats and chatbots are becoming increasingly popular, as buyers expect to be able to find the information they need at their own convenience. Integrating a chat software allows your customers to easily connect with your team when they need it.



During business hours, your team can be there to service an incoming request right away through a live chat function. However, outside of working hours, or simply when nobody is available at the moment during work hours, a chatbot can qualify the interaction so that when somebody is available, they have the context they need to manage the specific request appropriately.

Chat software can also be integrated to qualify leads, automatically create tickets, and help visitors find the information needed by looking up the knowledge base. When qualifying leads, chatbots can be set up to automatically welcome visitors, interact with them, and ask them lead-qualifying questions that you've pre-determined, such as company size, location, or the product category they are interested in. If visitors to your site are looking for help with an existing order, a chatbot can be set to request more information about the question and submit the information to an automatically created ticket that your team can access in the ticketing software. When integrated with a knowledge base, the chatbot can search through the various articles based on keywords.

When implementing new tools, it's most important to keep in mind the needs of your business and your customers, as well as make sure your team is ready and trained for the changes to come. No two businesses are the same, so choose wisely and experiment with various tools and technology to determine what brings you and your customers the most value.



# What the Changes Mean to Your Manufacturing Business

In the age when acquiring a new customer is anywhere from [5 to 25 times more expensive](#) than retaining an existing one, it's important for companies to invest in customer care, and make it a priority. Of course, you would still need your marketing team to create content and [attract leads](#) and your sales team to [close deals](#), but the focus should now be on aligning your teams to work together instead of in silos. Customers will feel the shift in congruency in your organization, which engenders confidence in your relationship, building trust and loyalty. When this is done well, positive word-of-mouth spreads and the business grows.

Sometimes, ensuring that you have done everything to encourage your customers to continue doing business with you means re-evaluating policies and trying completely new approaches and tools to see what works best. That's why it's fundamental to understand how the new approaches and technologies can help you foresee customer needs, reconsider your old processes to best serve customers, and ultimately improve the efficiency of your teams to keep costs down. Take some time to consider and evaluate your customer service program if you haven't yet. Perhaps a few things to consider:

- Are there ways to make it easier for your customers to talk to you?
- Are there processes that put obstacles in the way of customers having a delightful experience?
- Is there anything you can educate your customers about to bring them more value?
- Do your policies serve your customers, or do they serve you?

As you think of these questions, have an open mind to adequately assess if your business is truly centered around customer service. Are you effectively “serving” your customers?

B2B customers with high customer engagement scores achieve

**50%**

higher revenue/sales

Gallup's Guide to Customer Centricity Report, 2016



# How to Improve Your Customer Service Program?

Now that you know why your business needs to have a well-established customer service program and how it can impact your business's growth, you are probably wondering how to improve your program and what to start with. Below are customer service best practices that any business can use; they will help you create a customer-centered mindset and also excel in customer service.

## 1. Establish Customer Service Standards

No matter the size of your business, establishing effective standard operating procedures (SOPs) can clear a lot of discrepancies and safeguard the quality of customer support. Instead of just telling employees what to do, which is not only ineffective but puts the quality of your service at risk, develop a set of written step-by-step instructions your team can follow to effectively handle processes and respond appropriately in a variety of possible scenarios.

When SOPs are clearly defined, miscommunication reduces between teams, employees, and ultimately between the business and the customer. By having a clear document with acceptable standards, you improve consistency in how processes and tasks are performed, which then provides a baseline for customers' expectation when doing business with you.

## 2. Identify and Track Your KPIs

When you strive to maintain top-level customer service, setting SMART goals and tracking valuable metrics for your business is one of the fundamentals required.

To begin with, focus on a few important KPIs (key performance indicators) that make the most sense to your company, and make them the focus of your efforts to improve. For example, as a manufacturing business, you can focus on customer service KPIs, such as:

- Percentage of repeat customers
- Net Promoter Score (NPS)
- First Response Time
- Customer retention rate

Most importantly, consistently track your performance over time. Improving your customer service metrics isn't a quick fix. Always consider the long game and observe your performance as it evolves over time.



As you invest in the goal of improving your customer service program over time, you will be able to recognize trends and address them as they occur. Your KPIs should also be reconsidered from time to time to bring the best value as you continue to maximize your strengths and tackle your weaknesses. The job of monitoring your customer service metrics never stops.

### 3. Get Buy-In from Your Whole Team

Working to improve your customer service program should not be a solitary pursuit. Introduce your goals and processes to all the teams in the company and revisit them consistently together with the responsible stakeholders. Collaborating and delivering on customer needs across marketing, sales, and customer service is a fundamental part of a [customer-centric inbound methodology](#).

Aligning everyone in the company around the idea of customer success isn't simple at first, but there are certain things that can help foster the relationships between various stakeholders. For example:

- Monthly meetings can be set to discuss key numbers with your teams; be sure to check in with the departments that are responsible for those metrics.
- Remediations should always be clearly communicated with all stakeholders when following up with customers on inquiries and requests they have made.
- You can also set shared goals communicated to each department, helping to improve the overall customer experience.

When the entire organization moves towards a shared purpose, improvements come easier. Regular meetings and communications that allow teams to share insights, perspectives, and learnings with one another are bound to set up your program for success. Getting everybody involved will improve customer service and will reinforce to the teams that their efforts make a difference.

### 4. Assign Responsibility

Providing outstanding, reliable, and consistent customer service is nearly impossible without having a person in charge. Like any project, improving customer service starts with an owner of the project. In large organizations, the roles are more clearly defined, and the teams are well formed. However, things can get muffled if you are a small team to begin with. Nevertheless, having a person, better yet a team, responsible for following up on customer requests is crucial.

According to the [2018 Temkin Experience Ratings](#), a leading customer experience industry benchmark, leadership is recognized as a key competency to successful and sustainable customer experience. Without having a person whose sole responsibility is to ensure the quality of customer interactions, you risk customers falling through the cracks.



It's also equally important to provide your team with training and tools needed to effectively manage customer demand. Case in point, a help desk like [HubSpot Service Hub](#) allows visibility of both the big picture of current customer service health and ground details of each customer request received through all the different channels customers use to communicate with your business. When everything is centralized in one place, you can better track, automate, analyze, and optimize all your customer interactions, eliminating the risks of any request being overlooked.

## 5. Contact Customers Using Their Channel of Choice

As a business in manufacturing, you probably still primarily rely on the personal relationships your account managers or salespeople have developed with clients. We get it—your long-standing customers have forged almost personal relationships over the years, and if they have a request, they will most likely reach out to a certain person within your organization. However, the reality is that this method does not provide any other options to get in contact with your business and get the information needed at the customer's own convenience.



For someone who's simply looking to get an answer to a general question about your product, having to call or write an email might seem very time-consuming. In other words, you have to go beyond phone and email to keep today's customers interested in doing business with you. Your workforce—and theirs—will continue to change and evolve. Your overall infrastructure must adapt and evolve as well.

Support and engagement through the channels that your customers prefer are imperative to improving customer satisfaction. Not only do customers expect to reach you via their channel of choice, but they also want their questions answered as soon as possible. According to the [2018 Toister Performance Solutions study](#) surveying over 1,200 consumers, a one-hour email response time will meet the expectations of 89% of customers.

Here are some ways to help you improve your response times:

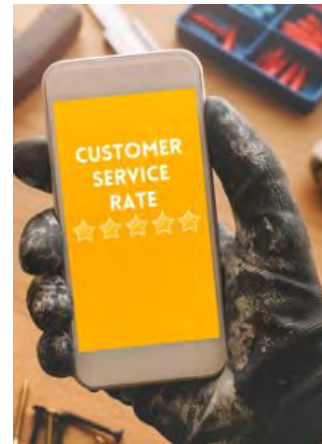
- Use chatbots to respond to simple customer queries
- Utilize a ticketing system for easier tracking
- Create a robust [knowledge base](#)
- Minimize time spent on team handoffs

Communicating to customers via their channel of choice and at a speed they require is often the difference between keeping and losing customers.

## 6. Collect Customer Feedback ... and Act on It!

As we stated earlier, gathering customer feedback helps you understand your customers better and what drives their satisfaction, and also gives you an idea on how you can improve your offerings to create an even better customer experience.

You can start with reviewing what customers think of your business on the internet (though monitoring social channels can be timely and incomplete for gathering well-rounded and direct feedback), but the biggest source of information will come from surveying your customers. There are various surveys that can be used to analyze the health of your customer service program, such as NPS (Net Promoter Score) and CSAT (customer satisfaction) surveys, in addition to long and short form surveys you can customize to fit your needs.



- **Net Promoter Score** – an NPS survey is probably the most common way to gauge customer loyalty. NPS scores are measured with a single-question survey that asks customers how likely they are to recommend your company to a friend or a colleague with a Likert scale question from 1-10. Depending on the response, customers fall into one of three categories: promoters, passives, and detractors. An NPS survey is the best way to identify your company's biggest advocates so you can use that information to further drive business growth.
- **Customer Satisfaction (CSAT)** – This method is commonly used to assess overall customer satisfaction at different points in the customer journey. By asking for an overall company rating and following up to collect more details, you can identify what areas of your business need improvement.
- **Customer Effort Score (CES)** – This single-item metric measures how hard it was for a customer to get their request fulfilled. It is commonly used after a certain interaction between a customer and a business occurred, such as placing an order online or resolving a ticket. It can be as simple as a three-point scale that will assess the helpfulness of customer service received.

By consistently asking for customer feedback, you receive valuable information and show your customers that their opinions matter. In a culture where feedback is readily shared on the worldwide web without provocation, the simple act of asking for feedback is well received, and often remembered as a positive experience, even if (and sometimes especially) when the initial encounter may not have gone so well.

Finally, collecting customer feedback must be followed by drawing insights and acting on them. The information gathered from the surveys should be analyzed and shared with the respective teams within the organization to prioritize the developments that you can make to further improve customer experience. Having the right analytics tools can help to see the big picture and promote an action-oriented approach.

## 7. Set Up a Knowledge Base

One way to ensure you have efficient customer service in place is by empowering your customers to self-serve their own questions and answers. This saves time for your team; provides a base of happy, educated customers; and reduces costs associated with servicing customers.

As stated above, a knowledge base is a collection of information that has everything your customers need to know about your business, products, and services in one easy-to-navigate location. If you already have an FAQ section on your website, it will serve as a baseline for your knowledge base that can also house other resources, such as videos about your products, whitepapers, eBooks, case studies, and more. In addition, a knowledge base is indexed in search engines, providing yet another way to boost your SEO efforts. With knowledge base software, you can:

- Help customers quickly and easily find the answers they're looking for
- Improve your team's productivity and eliminate time-waste
- Analyze what customers are looking for to improve documentation
- Improve search engine rankings with high-quality indexed articles

When building the knowledge base, you need to provide high-quality content that will be most helpful to your customers. Also, make sure it integrates with your help desk or chatbot software, allowing them all to work together toward the common goal of customer happiness.

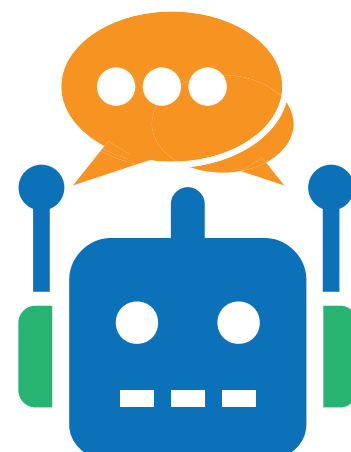
While building a comprehensive knowledge base made of high-quality content takes time and effort, it is one of the most cost-effective [content marketing strategies](#) that offers compounding returns in the long-term, in addition to improving your customer service program.



## 8. Have the Right Technology Stack

And last but certainly not least, to up your customer service game, you must have the right technology to support your initiatives, simplify processes, and make delivering exceptional customer service easier.

There are many software solutions available on the market today. The best are the ones that span over the range of marketing, sales, and customer service. These all-in-one tools ensure a smooth collaboration between customer-facing teams, allowing them to easily access client information—in real-time—to improve overall customer experience.



Some of the key functionalities to look for in a robust customer service software are:

- Live chat support
- Ticket management
- Customer feedback tool
- Reporting and analytics
- Omni-channel
- Mobile access
- CRM integration

You can still get a toolkit of different software solutions for sales, marketing, and customer service and work to integrate them, if that is at all possible. However, that means dealing with clumsy handoffs between the teams, inconsistencies in data, and contradicting practices.

To ensure a successful collaboration, experts from other departments should be able to easily access all customer information to improve the overall customer experience. The best way to do that is by having a single technology stack for CRM, sales, [marketing](#), and service automation. This way, all teams have the full context of the customer's journey, providing a more pleasant and integrative customer experience.



The customer service software from HubSpot makes it easy to connect with customers and level-up your customer service program. In addition to HubSpot's robust CRM platform, Marketing Hub, and Sales Hub, the new Service Hub provides you a seamless customer experience. Service Hub can be used as a standalone product; if you already use HubSpot, it is best to add it to your existing setup.

Some of the key tools presented by [Hubspot's Service Hub](#) are:

- **Ticketing** – This tool allows both the users of your team and customers to submit support tickets, either coming from a chatbot, email, phone, or other channels. Track all tickets in one central location so no request goes unnoticed.
- **Customer feedback** – HubSpot lets you choose the most appropriate feedback tool and delivery method for your specific goals so you can focus on your KPIs.
- **Surveys** - Promoter Score (NPS), Customer Satisfaction (CSAT), and Customer Effort Score (CES) surveys all you to keep track of all your customer feedback in a single dashboard so your whole team can monitor changes in customer satisfaction over time.
- **Knowledge base** – Easily create a customizable knowledge base with articles organized into categories to make self-service information search easy. The built-in reporting dashboard and search analytics allow you to analyze the impact of your articles so you can improve your help documentation.
- **Conversational bots** – Scale one-on-one communications with a chatbot to qualify leads, search the knowledge base, create a ticket, or simply handoff the chat to the right member or a team.
- **Team email** – Use team-wide email to automatically turn incoming emails into tickets or route to your conversations dashboard.
- **Goals** – Report on metrics using goals to easily track and meet customer service level agreements (SLAs).

HubSpot Service Hub works on top of your free HubSpot CRM, so your service team has access to all the previous interactions the customer had with marketing and sales teams. Knowing the context of previous interactions, your team becomes better equipped to fulfill customer requests and deliver exceptional customer service.

**Here's the vision and goal: communicating with customers is easier, requests are resolved in one portal, and your customers can self-serve queries, saving employees time and resources. Customer service is elevated—and your customers are elated.**



### Conversations

Manage 1-to-1 customer communications at scale through a universal, collaborative, inbox that aggregates customer emails, chats, and more – and is accessible to your entire team.



### Tickets

Log customer issues as tickets that can be assigned to members of your team, organized and prioritized, and tracked in a central location.



### Feedback

Get a pulse on customer happiness, and deploy surveys to gather feedback that can be used to build a better customer experience.



### Automation & Routing

Automate your customer service processes with ticket routing, escalation, and task creation. Use feedback responses to kick off automated customer marketing emails or internal notifications to your team.



### Knowledge Base

Turn your customers' most frequently asked support questions and tickets into a robust, optimized knowledge base of help articles and documentation that's indexed in search engines.



### Team Email

Create team-wide email aliases that automatically turn incoming emails into tickets or get routed to your conversations dashboard.



### Live Chat

Engage in contextual, personalized customer service conversations with your customers in real time on your website.



### Conversational Bots

Use bots to improve live chat efficiencies and scale 1-to-1 communications by routing customers to relevant help documentation, the appropriate chat agent, and more.



### Reporting

Measure the impact of your customer service efforts with built-in reporting tools that track knowledge base usage data, ticket volume and response time, customer feedback, and more.



### Goals

Report on metrics related to a specific customer goal, like ticket response time. Use goals to easily track and meet customer service level agreements (SLAs).



## HubSpot Growth Suite

Integrated together, the Marketing, Sales, and Service Hubs work in their full capacities, aligning your customer-facing teams through the use of one unified software. For companies that choose to benefit from all three hubs, HubSpot offers the Growth Suite bundle for only slightly more than the price of one hub. It is most recommended for companies that adopted an inbound methodology or are working towards transitioning to it. Since it includes all of the Hubs and is built on top of HubSpot's CRM, the HubSpot Growth Suite platform is the best way to align your entire organization towards a single growth goal.



As a HubSpot Agency Partner, Grant Marketing has successfully grown clients' businesses through powerful inbound strategies. We deliver a robust inbound program and help clients maximize their use of HubSpot. If you have any questions regarding HubSpot's software offerings, we'd be happy to help. New software can be a little complicated to figure out at first, but once you see it in action, HubSpot is one of the most efficient tools to ensure a delightful customer experience—and help your company reap the benefits.

Contact us to learn more about HubSpot, and how we can help you utilize it for your overall company growth.



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