

RETENTION

RESPONSE TOOL-KIT:

*Managing Customer & Employee
Retention During a Crisis*

A MESSAGE FROM OUR CEO

From The Desk of Adam Dorrell:

I wanted to take a moment and make a video for all of you. We know things are tough out there right now and it's certainly not business as usual. A lot of you have reached out directly to us for guidance on how to run your Account Experience programs during the COVID-19 crisis. As a result, we decided to make this response kit to help you navigate the COVID-19 crisis so you can provide YOUR clients with the best possible experience in these uncertain times.

And let's be clear with each other—retention, whether it be account or employee, matters now more than ever before. It was always important, but in this post-pandemic world, businesses across all industries are expecting slowed acquisition growth for the foreseeable future. It's the right business decision to look inward to your customers and yes, even your employees for growth in 2020.

In closing, we know these are uncertain times, but we want you to be certain CustomerGauge will continue to be a reliable partner to you during this global pandemic. We'll get through this and forge the new normal together. And the best thing you can do right now is focus on account and employee retention. We hope this response kit is helpful to you and your business. Please do not hesitate to reach out directly to me if you have any additional questions.

Video Recap:



Adam Dorrell,
CEO & Co-Founder of CustomerGauge

Reach Out To Me On:



WHY RETENTION MATTERS NOW MORE THAN EVER.

It's time to get real—we're in a global health crisis of the likes we've never experienced before in any of our lives. No matter what the experts say or predict, we don't know what will happen.

These are times of great uncertainty and with uncertainty comes business instability, which can eventually lead to an economic downturn. Now, we're not saying this to scare anyone—we're saying this so we all understand the situation. If you attempt to understand something, you can start to fear it less.

And we're confident, you have already positioned your companies in the best possible way to minimize the impact of whatever is coming our way. By investing in [experience and retention software](#), you already have the tools in place to help navigate through these murky waters.

This is a companion guide for you during the COVID-19 pandemic to help make both account and employee retention top priorities.

 [Read The HBR Article Here](#)

“Companies that put customer needs under the microscope, take a scalpel rather than a cleaver to the marketing budget, and nimbly adjust strategies, tactics, and product offerings in response to shifting demand are more likely than others to flourish both during and after a recession.”

- Harvard Business Review

The important thing is to not panic. Just because we're in a crisis, does not mean shifting strategies in a drastic way is the right thing to do. If you drift away from your current base now, you'll be a weaker company as a result when we get out of this according to [HBR](#).

The key is to find a sensible plan to maintain your account and employee retention rates. In other words, do everything possible to stabilize your brand in the minds of your internal employees and your external customers.

Account Retention

- + Why Should You Care?
- + What Should You Do?
- + How We Are Doing It
- + How Others Are Doing It

ACCOUNT RETENTION

WHY SHOULD YOU CARE?

As acquiring new business becomes more of a challenge, your existing account-base will become the major driver of growth for the foreseeable future.

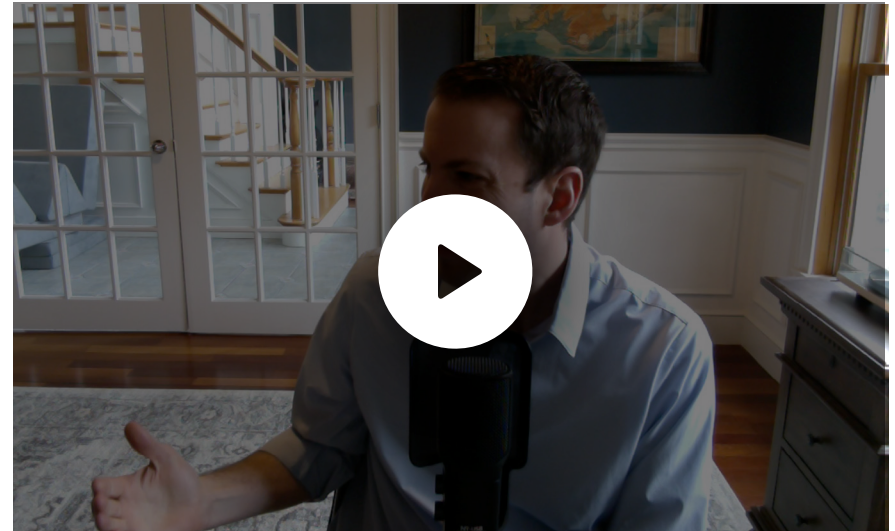
We understand this is a sensitive time for all companies and surveying or collecting additional feedback from customers may not seem like the right thing to do, but we assure you, it's the only thing to do!

Your customers are in front of their computers, now more than ever before. This is a fantastic opportunity to deepen the relationships you have with your accounts through sound outreach strategies and thoughtful, empathetic communication.

“your existing account-base will become the major driver of growth for the foreseeable future.”



WHAT SHOULD YOU DO?



5 Tips You Should Follow:

- 01** Lead With Empathy
- 02** Lead With Your People
- 03** Collect Feedback at The Same Levels, If Not More
- 04** Close The Loop Vigorously
- 05** Track Account Signals Other Than NPS

01 Lead With Empathy

First off, don't act like it's business as usual—it's not. What worked yesterday, won't necessarily work today. And more importantly, how you conduct business during this crisis will impact your brand's perception after the crisis subsides. Our suggestion is to lead with empathy. If we can say it bluntly, don't make it about you, make it about them. This means first, acknowledging the situation. It's a shared experience across the entire world. For the first time in a long time, we all have something in common regardless of country or background. Use this to empathize with the person at the other end of the account. We are all people first, after all. Acknowledge the impact COVID-19 may have had on their business and people, but remind them, you are a partner they can count on during this time.

Talk about how collecting feedback 'under normal circumstances' was important then, but again, acknowledge things have changed.

Mention that their feedback is relevant now, more than ever before, to ensure you're meeting their needs in this difficult time. Not only that, demonstrate to them that you have taken steps to alleviate some of the burden COVID-19 has created in their business. Lift usage limits, open up features that are usually paid, etc.

If you can't manage that, show them you're doing your part by supporting causes that are on the front-line of the fight to stop the spread of COVID-19. Do anything you can to soften the blow and your accounts will remember your act of kindness for years to come.

"Mention that their feedback is relevant now, more than ever before, to ensure you're meeting their needs in this difficult time."



02 Lead With Your People

We suggest assigning an executive sponsor to every account (if possible). Their main goal is simple—just listen. Join the regular calls and listen to the account's feedback, concerns and pains in their time of need. Then, activate these execs to be the champions for those accounts internally.

Empower them to work with the product or support teams to address concerns or push fixes that would greatly alleviate pain in the account. Next, make sure your CEO has skin in the game. If he/she hasn't sent out a communication, consider doing this. Make your CEO's message impactful by offering a plan to alleviate your customer's pain in this time of uncertainty. If it's not feasible based on the size of your company, tap him/her for a few customer calls a week. This simple act that will take 20min max a week will pay massive dividends not only for your accounts, but your CEO!

Another idea is to organize an organic outreach campaign at the support-level. Nothing fancy, no corporate scripts, simply "under normal circumstances, we'd conduct a review. But more importantly, how is everything going? I know things are crazy right now, but is there anything I can help you with?" Oftentimes, customers will mention something that will make their lives easier. And what better time to offer a fix than now?

Focus on touching as many accounts as you can in a short amount of time to maximize the impact of the message. And finally, you can send a response kit (like this one) that details best practices companies can employ to better navigate uncertain times.



"Focus on touching as many accounts as you can in a short amount of time to maximize the impact of the message."

03 Collect Feedback at The Same Levels, If Not More

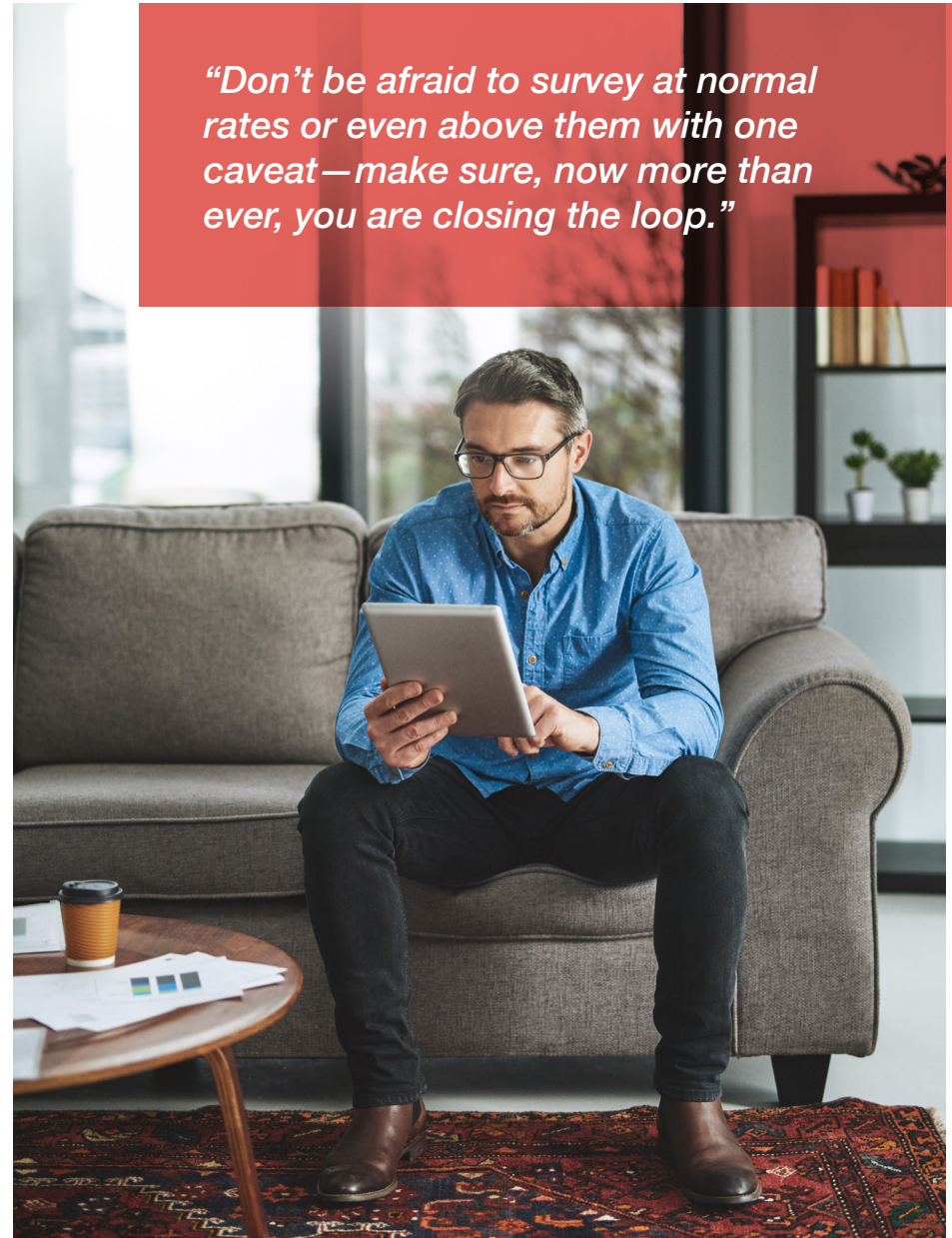
So finally, let's address what we're sure is on a lot of people's minds—are surveys really the right thing to send right now? Short answer is yes, if done properly. Again, lead with empathy (see above) and you should be fine.

Many of our customers are reporting NO drop-off in response rates post-pandemic vs pre-pandemic. This is an encouraging sign that companies are still taking customer feedback seriously. And here's the thing—people are at their computers now more than ever before! We'd be surprised if response rates didn't start to trend up!

Yes, we realize there can be this feeling that your accounts don't want to hear from you or that they're too busy to give feedback at the moment, but we'll remind you that the companies who maintain strong account-bases during a crisis or down-turn will come out stronger on the other end. And let's not forget, if you can help them in some way like offering free features or lifting usage caps, etc. We're sure they'd love to hear from you.

So don't be afraid to survey at normal rates or even above them with one caveat—make sure, now more than ever, you are closing the loop. If your organization is not currently capable of closing the loop on account feedback in this crisis, you could be doing your brand a disservice. The last thing you want one of your customers to think is, “they're wasting my time and not taking my feedback seriously.” If you can't effectively close the loop on the feedback received, scale back your sending to levels where you can close the loop. Start testing your infrastructure slowly and ramp up sending in tandem with your organization's ability to close the loop with your accounts.

“Don't be afraid to survey at normal rates or even above them with one caveat—make sure, now more than ever, you are closing the loop.”



04 Close the Loop Vigorously

If a major stakeholder from one of your accounts gives you detailed feedback and a passive or detractor score, don't just ignore it. Now more than ever, follow-up on the feedback as quickly as possible.

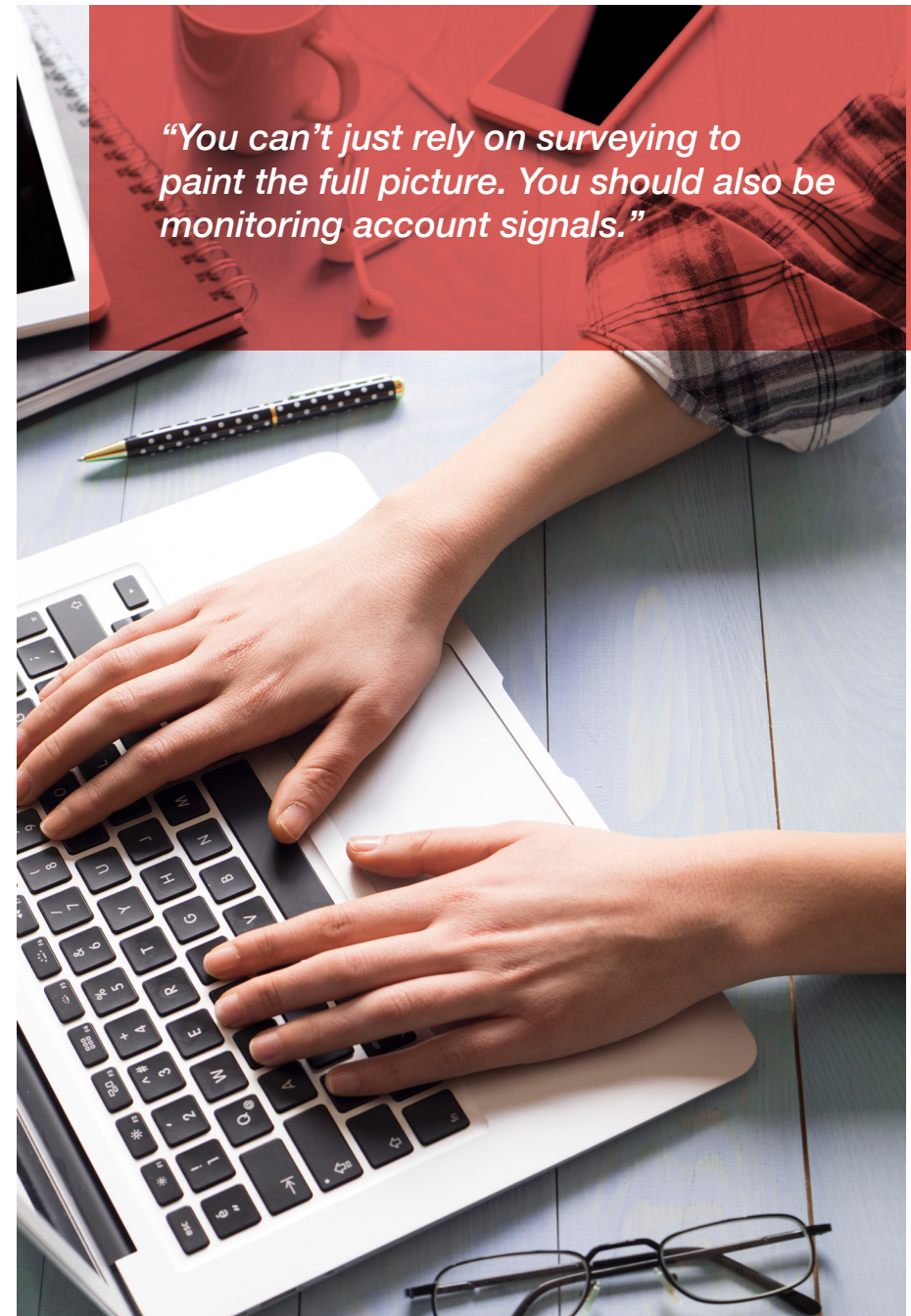
Tie in the executive sponsor and reach out to let your customers know “we hear you and are doing everything humanly possible to address the issues.” And once you do address them, follow-up with an update and say “these are the actions we took as a result of your feedback.” Yes, it's a lot of work, but people won't forget your attention to detail and follow-up during this crisis.

Besides, increasing your Service Level Agreements (SLAs) for closing the loop will pay dividends in the long-run. People need to feel like they're being heard. Sometimes, just being heard is the difference between keeping an account or losing it. If you can relay that you've heard them quicker, even better.

05 Track Account Signals Other Than NPS

If retention is your number 1 priority, surveying is important, yes. However, you can't just rely on surveying to paint the full picture. You should also be monitoring account signals.

I know we talk about this a good amount, so we won't give you the marketing version. But if you pair Net Promoter Score® (NPS) or satisfaction metrics with account signals like product usage, support tickets, email engagement, etc., this can help your company monitor engagement from an entire account—across all stakeholders and channels. This most certainly will help you stay ahead of churn better than simply relying on a single survey point.



HOW WE ARE DOING IT

- We've automated our relationship surveys in a staggered fashion to spread the close-the-loop support burden over a longer period of time.
- We've increased our internal SLA on customer calls from 4 weeks to 2 weeks.
- We've offered our customers free eNPS software for 3 months so they can better monitor the health and wellness of their remote workforce as we enter into the new remote reality.
- We've assigned an executive sponsor to every one of our accounts.
- We're upping our product email cadence. These will keep customers informed of major updates that directly affect how they can retain their own clients whether it be through features or best practices.
- We'd like to start discussing issues like "managing an experience program during uncertain times" in a public forum via webinars. With our collective experience across a multitude of industries we can help bring clarity to a confused market so brands across the world could benefit in their time of need. More to come on this!
- Finally, we plan to over-deliver wherever possible. We're taking this opportunity to streamline experiences with us. This may mean making things easier in the CustomerGauge app or on the business side. Please stay tuned for updates!



HOW OTHERS ARE DOING IT

It's not all bad news—companies around the globe are stepping up and putting their customers and communities' needs first. In fact, while looking for examples to put into this response kit, we were overwhelmed.

Companies are delivering remarkable customer experiences in a big way during this crisis. We've decided to split the examples below into two different buckets—customer-centric and community-centric. Below, you'll find great examples of both:

Customer-Centric Examples:

- Hootsuite is providing [free access](#) to its Professional Plan to nonprofits and small businesses impacted by the COVID-19 crisis.
- Internet providers like [Comcast](#) are boosting speeds on their basic packages and offering free internet to low-income customers. [Cox](#) and [Spectrum](#) are also providing limited-time internet to families with [K-12 students](#).
- Google is allowing [G Suite](#) for Education customers to use the Hangouts Meet premium functionality for free through July 1.
- Zoom is free for schools and has lifted its [40-minute meeting limit](#).
- LinkedIn has a 16-part [course](#) on remote working it's offering for free.
- Cisco is offering free [90-day licenses](#) with unlimited usage.
- 1Password is offering its [1Password Business](#) service free to small-business owners for six months
- Slack is offering [free upgrades](#) to teams actively working in response to COVID-19, including virus R&D, response plans and mitigation efforts.
- Mint Mobile is providing all current and new customers [free unlimited high-speed data](#).
- T-Mobile is providing unlimited data to customers for the next [60 days](#) in addition to data for mobile hotspot users.
- Banks such as [Umpqua Bank](#), [Wells Fargo](#) and [Bank of America](#) are showing up to support their communities and, in particular, small businesses with offers ranging from deferred credit card payments to specific [grant programs](#).
- TaskRabbit now allows customers to cancel or reschedule a task within [24 hours](#) of the start time if they [fall ill](#).
- Adobe has made free our [Creative Cloud](#) desktop apps for students until May 31.

Community-Centric Examples



Community-Centric Examples:

- AB InBev (Anheuser-Busch) breweries are producing [hand sanitizers](#) and disinfectant to donate to hospitals and communities around the world.
- Tech companies like SoftBank, Apple, Facebook and Salesforce have donated significant supplies of N-95 masks to local hospitals. PG&E, Tesla, Flexport and IBM have also [donated masks](#).
- Verizon is donating [\\$2.5 million](#) to nonprofit Local Initiatives Support Corporation for its Small Business COVID-19 Recovery Fund.
- Office 365 A1 is offering completely free and customized hub for class teamwork with Teams that includes video meetings, online versions of the [Office 365](#) apps, as well as compliance tools, and information protection.
- Facebook is offering [\\$100 million](#) in cash grants and credits to up to 30,000 eligible small businesses in 20 countries.
- Lenovo has provided over [\\$10 million](#) in hardware & software to support hospitals and education across the globe.



📷 Photo Credit: [Surodeep Chaudhuri, Anheuser-Busch InBev](#)

Employee Retention

- + Why Should You Care?
- + What Should You Do?
- + How We Are Doing It

EMPLOYEE RETENTION

WHY SHOULD YOU CARE?

Your employees are the heartbeat of your organization. And their commitment to the company has a direct impact on the sustainability of your business. However, recently, they've been asked to make more changes to their daily routines than ever before.

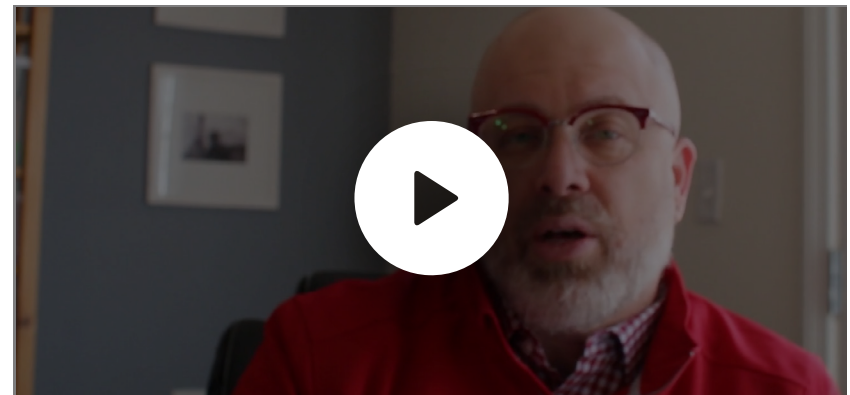
Your employees are doing their best to adjust to this new remote reality while maintaining "business as usual", but it's a challenging time and they need your help. Now is the time to show your employees how much you care for their wellbeing and will do what it takes to support them. Because a few months ago, there was a 'war on talent' and it will surely start up again after the COVID-19 pandemic is over.



"Your employees commitment to the company has a direct impact on the sustainability of your business."

We've said it before and we'll say it again, happy employees yield happy customers. Keep your employees close during this time of wide-spread change and you'll come out the other side with happy customers and a more cohesive team.

WHAT SHOULD YOU DO?



4 Tips You Should Follow:

- 01 Lead With Empathy
- 02 Implement eNPS
- 03 Be Transparent
- 04 Implement Change

01 Again, Lead with Empathy

The single most important thing you can do for your employees right now is understand. “Empathy is a powerful tool that allows you to be open and understand points of view that are vastly different from yours.”

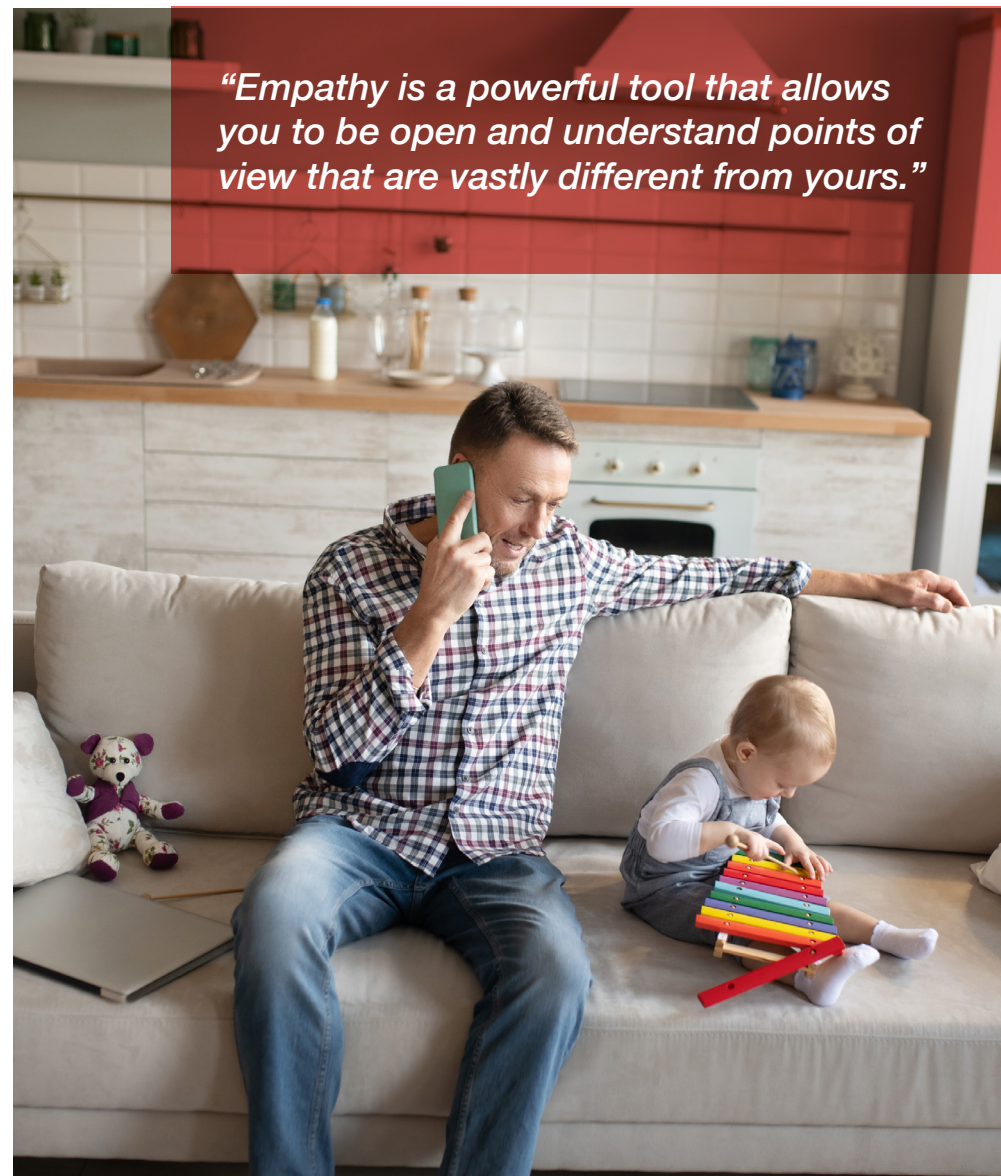
Understand that everyone’s personal lives and work lives have just blended into one— and that means something different for each employee.

Some employees will adapt more easily, while others may need more regular check-ins, assistance, or active management.

No matter the unique circumstance, it is your responsibility, as an empathetic leader, to put yourself in another’s shoes and help them work through any challenges they may be facing.

Reach out to those employees who are living alone. Social interaction is a basic human need, but without it, some may struggle.

Let them know they have a support group that will be there for them whenever they need it. Establish ‘culture ambassadors’ from each department that have the informal job to keep people connected through shared experiences in the remote world.



“Empathy is a powerful tool that allows you to be open and understand points of view that are vastly different from yours.”

02 Implement eNPS

As mentioned above, CustomerGauge is offering eNPS software to all of our clients free, for 3 months. Send as many surveys as you'd like. What matters right now is that you all look after your employees well-being in this time of change.

If you're already operating some sort of employee experience program (CustomerGauge or other), great! We suggest you up your surveying cadence in order to better monitor the wellness of your employees during this remote work period. Another major benefit of upping your surveying frequency is you'll start to establish eNPS benchmarks for your company which will allow you to get a better idea of the collective sentiment and react quicker if scores drop.

03 Be Transparent

Once the feedback from your employees is received, be completely transparent with them. Discuss the scores by office location and how they differ, address specific comments, and even open up the floor once again for a discussion. It's important your employees feel like they have the option to address any shortcoming head-on in an open forum or anonymously via survey.

On the flip side, employers should also practice radical candor in addressing employee feedback. Talk about what's possible to adjust, what's not at the moment. Don't be afraid to say no, but reiterate that you hear them and that you're doing your best to make the transition as comfortable as possible. Employees will appreciate the transparency and feel more bought into the company vision as a result.

04 Implement Change

Take employee feedback seriously! If there are reasonable suggestions that can be made to improve the overall work satisfaction of your team, make them. Allocate a specific budget if possible to address these newly surfaced needs as your organization transitions to a remote environment.

While upping your weekly survey cadence, it's important to implement real change as a result of the feedback whenever possible. Otherwise, your employees will feel less and less bought into the process, if they do not think real change will be made as a result of their feedback.



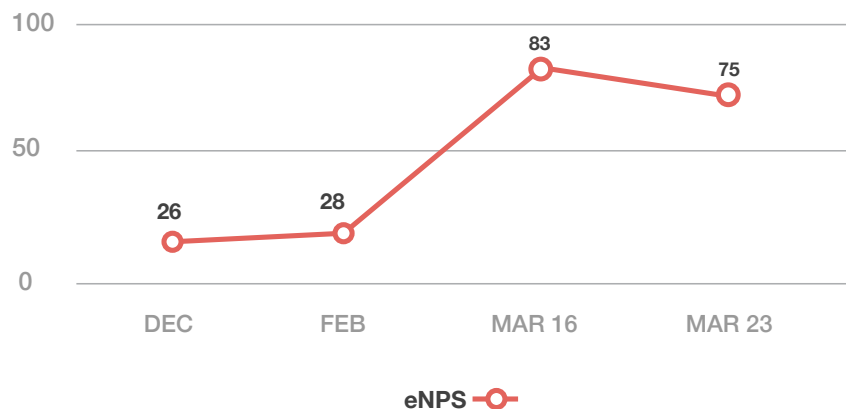
HOW WE ARE DOING IT

Weekly eNPS Surveys

We've increased the frequency of our eNPS surveys from quarterly to weekly to stay updated on the sentiment of our employees during this crisis.

Our weekly eNPS surveys are considered a different type of survey vs. our quarterly eNPS survey (think transactional vs. relational). As a result, we have started to create a library of new eNPS benchmarks based on a weekly send cadence. Below you can see the transition from our quarterly eNPS to our weekly eNPS—notice the significant uptick. It would be easy to get excited about such a large increase in satisfaction, but instead, we're treating the set of weekly scores as the new average instead of comparing quarterly data vs. weekly data. Our goal is to monitor the weekly fluctuations (higher or lower) and take immediate action if needed.

CustomerGauge eNPS Transition



"Surveying our employees weekly for a quick wellness check has proven critical in keeping our business operating at normal levels."

- Camilla Scholten, COO & Co-Founder of CustomerGauge

Cultivated Digital Culture

Over the years, we've built a strong company culture, and even though we've moved to a 100% remote workforce, we're dedicated to keeping our bonds tight.

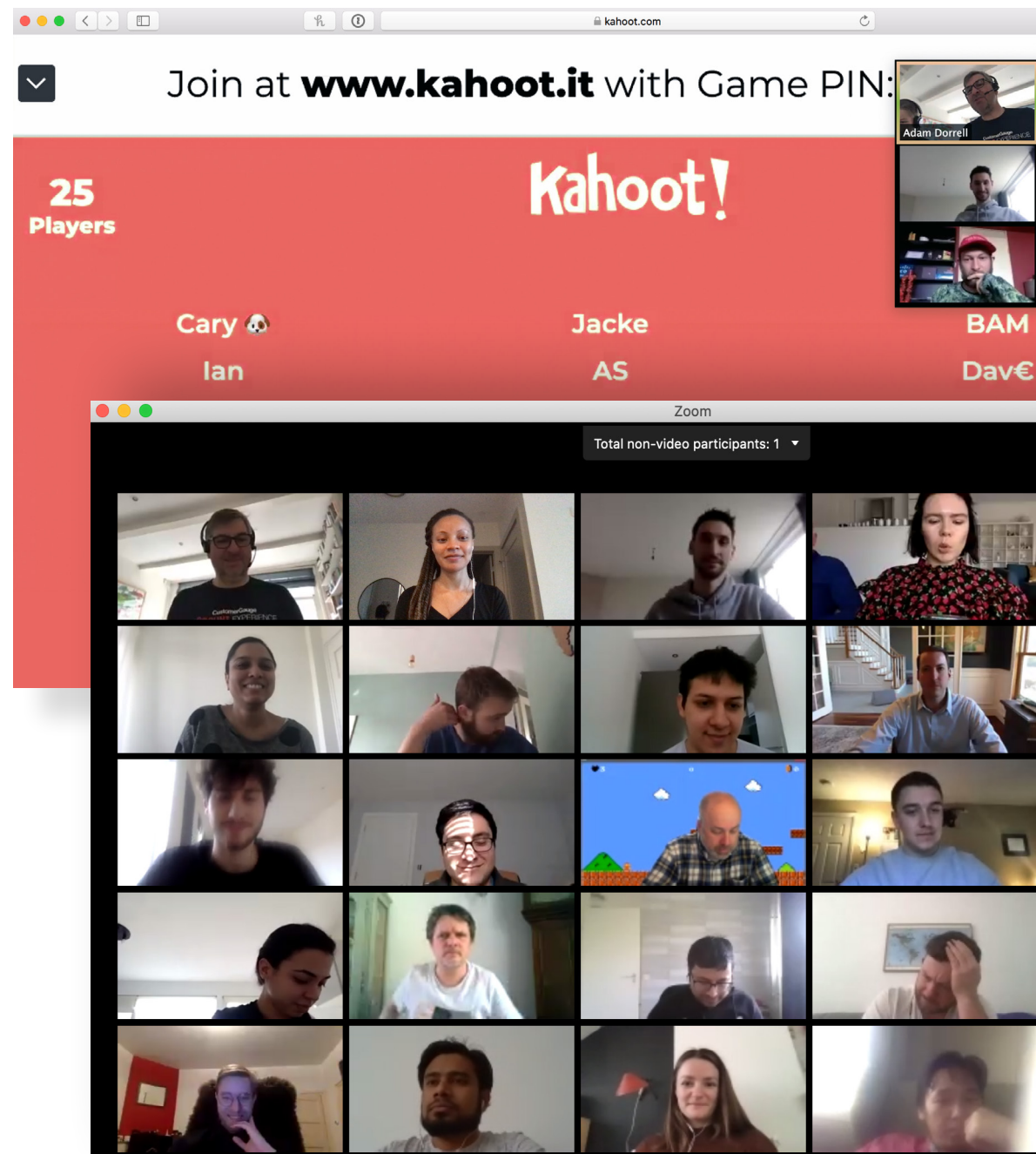
So we've cultivated a new digital culture to keep us connected to one another during this time of social distancing.

Every morning we join a company-wide Zoom meeting to engage in a game of [Kahoot trivia](#). The purpose of this activity is to give Gaugies a break from their packed schedules to engage in something fun.

[Zoom](#) gives us the ability to launch this company wide every morning and each department takes turns making the questions. There are two teams and things get highly competitive!

Gaugies not only compete to win trivia in honor of their team but use Zoom's digital background feature to see who can get the biggest laughs from the team.

Something we're particularly proud of is leveraging our own [digital signage](#) in desktop screensaver form to all Gaugies. This way, even remote, Gaugies will see customer feedback multiple times a day to remind them of our important mission.



We've also made an effort to block off time on our calendars for routine office activities such as lunch meetups and end-of-the-week happy hours.

Part of the challenge of remote work is maintaining the social aspects that happen naturally when working in the office. So we've found a way to recreate those experiences digitally to maintain a sense of connection.

As a company CustomerGauge has always utilized Slack for internal communication. But, now with our employees working from home, we have taken it one step further.

Slack Channels Like:

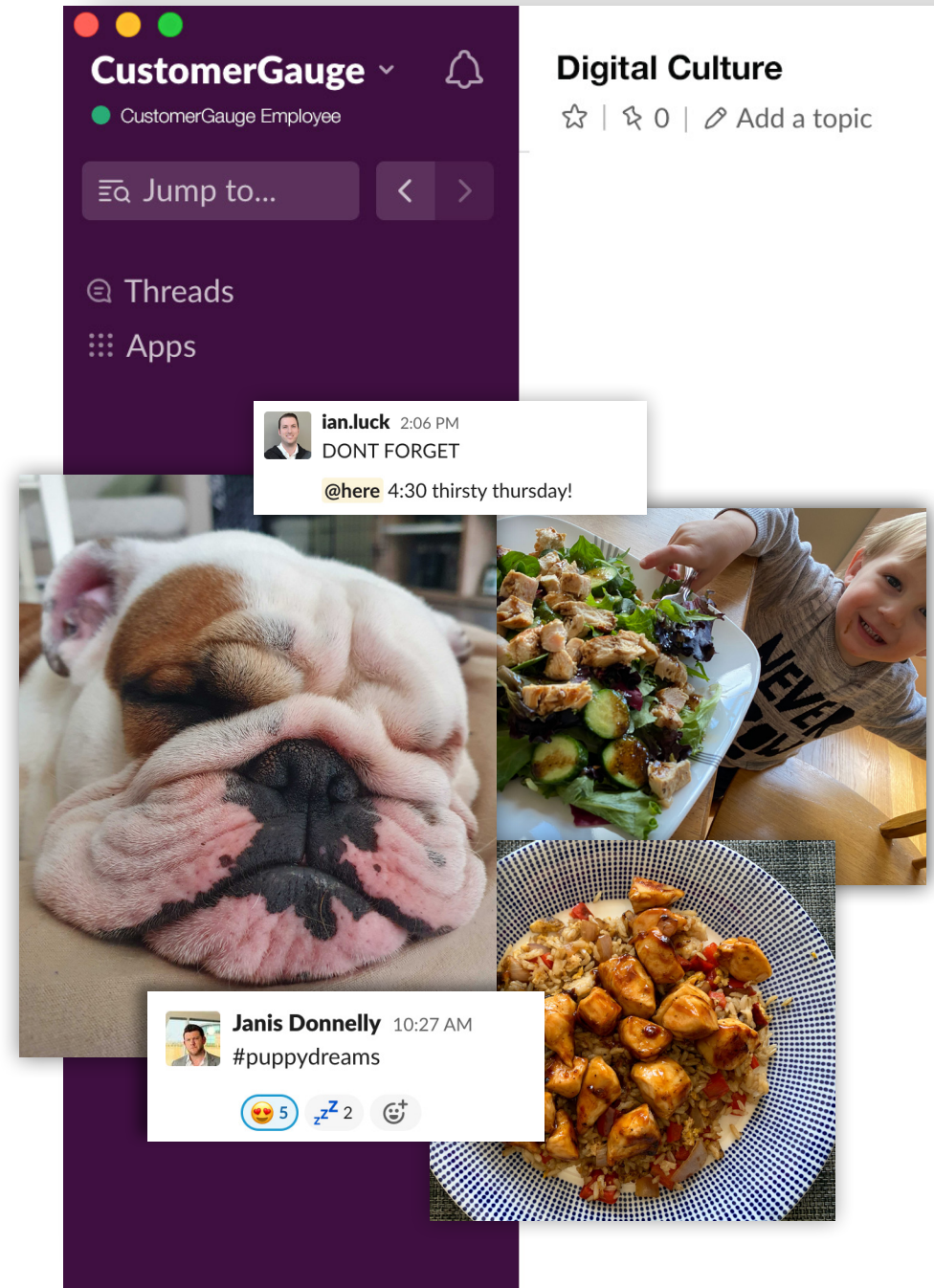
✓ Pets of CustomerGauge

We have created a slack channel for pets only! All Gaugies share their furry friends throughout the day as they are also “hard at work”. Giving us all a chance to celebrate our new furry co-workers.

✓ Lunch Break

Around lunch we join online “lunch rooms” in zoom, or simply share a food picture of what we each have on the menu that day. Nothing like a friendly competition on who has the best lunch!

And finally, some managers have opted to hold office hours and simply keep a Zoom open throughout the day. This way team members can pop in and ask questions as needed and keeps the lines of communication open across our global offices and our management team accessible.



RECOMMENDED READING

We hope you found this Retention Response Kit helpful for navigating these uncertain times. We're not pretending to have all the answers, but we did want to address some of the questions we were receiving from our customers.

If you have any additional questions or would like to add to this response kit with additional tips, we'd love to hear from you. We want this to be an open-source guide for all of the CX professionals out there struggling to put a playbook in place during a time of crisis.

Below you'll find additional reading that may come in handy throughout your journey. Thanks again for reading the Response Kit and stay safe out there!



EBOOK

NPS 101: Retention Management To Combat Churn

[Read Now](#)

EBOOK

The Definitive Guide To B2B CX: Referral Marketing

[Read Now](#)

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