17

Templates to Help You Put the Customer First

HubSpot

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Introduction

When you're growing a business, two numbers matter more than anything else:

1. How much it costs to acquire a new customer (or "CAC")
2. That customer's lifetime value -- how much they'll spend with you over their lifetime (or "LTV")

For many years, most businesses (us included) focused on lowering CAC. Inbound marketing made this relatively easy, but the new rules of the internet mean this is getting harder. As Facebook, Amazon, and Google tighten their grips on content, the big opportunity for today's companies is raising LTV.

If your customers are unhappy, you might be in trouble. But if you've invested in their experience and designed a strategy that puts them first, you're well-poised to grow from their success. Quite simply: Happy customers transform your business from a funnel-based go-to-market strategy into a flywheel.

Funnel-to-Flywheel

Then = Funnel
Customers as an afterthought

Now = Flywheel
Customers at the center
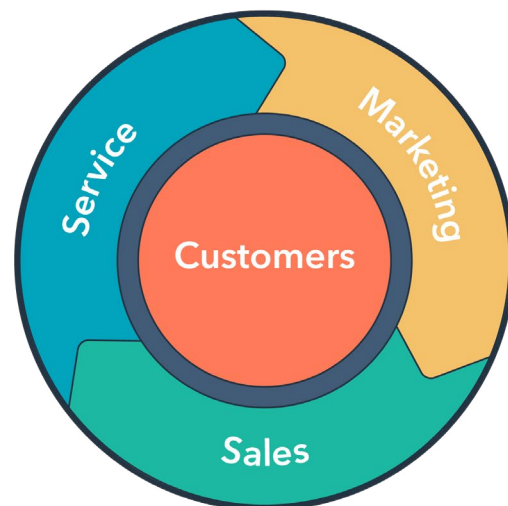
Through promoting your brand, they're supplementing your in-house acquisition efforts. This creates a flywheel where post-sale investments like customer service actually feed "top of the funnel" activities.

If you're feeling a little uncertain about how your customers feel about your business, it's not too late to do something about it.

In fact, we recently evaluated our own performance against something we're calling the Customer Code tenets and set out on a mission to strengthen and improve our commitment to customer success and satisfaction.

Tenet #1: Earn my attention, don't steal it.

Tenet #2: Treat me like a person, not a persona.

Tenet #3: Solve for my success, not your systems.

Tenet #4: Use my data, but don't abuse it.

Tenet #5: Ask for feedback, and act on it.

Tenet #6: Own your screw-ups.

Tenet #7: Help me help you, by helping myself.

Tenet #8: I don't mind paying, but I do mind being played.

Tenet #9: Don't block the exit.

Tenet #10: Do the right thing, even when it's hard.

The Customer Code outlines a shared set of principles and beliefs on how to build a company that customers love. It's rooted in the idea that it's not about what you sell, but how you sell.

To give you an actionable starting point to join us in this journey, we put together a series of templates aimed at knowing your customer, hearing your customer, and connecting with your customer.

Inspired by the Customer Code tenets, we believe these resources will help you focus more on your customers, and ultimately help your business grow better. Keep reading to acess the templates.

1

Know Your Customers:
Persona Templates

In a world where customer trust is hard to come by, the more you know about your customers -- their challenges, goals, demographic traits, communication preferences, and so on -- the better chance you have to position yourself as a reliable partner. A partner worth doing continued business with.

This is where buyer personas come in.

A buyer persona is a semi-fictional representation of your ideal customer based on research and real data about your existing customers.

Buyer personas provide structure and context for your company, making it easier to map out content and services, allocate your team's time and resources, and achieve alignment across your organization.

And while persona documents are a valuable, contextual tool for businesses, when we look to the Customer Code, there's an important tenet to make note of: "treat me like a person, not a persona."

The message here is simple: use persona documents to steer you in the right direction when it comes time to build a relationship with your customer, but don't let it define the relationship.

Remember that it's more important for you to listen than assume, as each customer comes with a unique perspective and background story. That's how you truly put the customer first.

Ready to create your own personas for your business? We've created blank PowerPoint templates for developing three distinct personas.

Click the button below to download your own customizable templates.

Click Here to Download the Persona Templates

Bonus Resource:

If you're looking for a more interactive persona creation experience, <u>check out our Make My Persona tool.</u>

<u>Make My Persona</u> will walk you through a seven-step persona creation flow, complete with context around why each piece of information is important. Each stage of the flow focuses on a different aspect of your buyer persona -- from their age and education to their goals and challenges.

Once you complete the walkthrough, you'll enter the persona document editor. At this stage, you can customize the look, feel, and format of your persona document to align with your unique business needs and branding.

2

Hear Your Customers:
Customer Satisfaction Survery Templates

Your happiest customers can be more effective than your whole sales and marketing departments in spreading the good gospel about your business.

Your most frustrated customers? Well, negative word-of-mouth travels fast.

This is where customer satisfaction surveys come in.

Customer satisfaction surveys are used to gauge how your customers feel about your company or a given experience with your company.

These surveys can come in many different forms, and you can use these surveys to segment customers based on satisfaction scores, measure relative customer satisfaction scores over time, or find insights for customer experience improvements.

If you want to ensure you're providing a quality customer-first experience, we recommend you start surveying your customer base right away to understand how likely they are to recommend your product to a friend.

You can also send out post-case surveys to customers whose issues your team has helped resolve.

At HubSpot, we track Net Promoter Score® (or NPS) maniacally -- it's a company-level metric that we all work toward improving. This helps us:

- Identify holes in our customer service early
- Track customer sentiment over time -- the trend of NPS is far more useful than one raw number
- Quantify the value of customer happiness -- when we changed a customer from a detractor to a promoter, that change increased LTV by 10-15%.

Though, there are many other survey types, such as Customer Satisfaction Score (CSAT) and Customer Effort Score (CES) that can also be used to check the pulse of your customer experience.

The way we see it, measuring customer satisfaction doesn't have to be difficult. And when you have the right starting point, it's actually quite simple. Here are a few Google Form survey templates to help you get started.

Click Here to Download the Survey Templates

3

Connect With Customers:
Customer Email Templates

In the service space, navigating customer communications via email requires a clear understanding of the audience and a careful approach. The wrong messaging has the potential to make a bad situation worse. And a delayed response can signal to the customer that you're avoiding responsibility or you're unprepared to fulfil their request. (Not a good look.)

A customer-first email communication strategy should be consistent at all touch-points during a customer's lifecycle – and timely. While automation is often in some capacity used to ensure the latter, it's important that you don't allow automation to compromise personalized service. At the end of the day, people want to know that they are not only being helped by other people, but rather, that they are being helped by other people that understand their needs.

When it comes to the types of customer emails you might find yourself sending, there are many.

Here's a look at few customer-first emails that we suspect you'll run into:

1.   Welcome Emails. You only get one opportunity to make a first impression – don't waste it. Depending on your product or service, your welcome email might be used to deliver videos, special offers, onboarding materials, or just serve as a friendly hello to establish a relationship with a new customer. Use this as an opportunity to introduce what makes your brand unique through a customer-centric message.

2.   Thank You Emails. Your customers spend time and resources supporting your business, and they deserve a thoughtful acknowledgment of how much they mean to your business. Thank you emails should focus on appreciation and are never to be used as an opportunity to get your customers to spend more money.

3.   Apology Emails. You messed up. Now what? As the Customer Code would advise: "own your screw-ups." Apology emails should be genuine, timely, specific, and actionable. The goal is to say you're sorry, be sorry, and make it better.

Regardless of the situation in which you are emailing – an apology email, a thank you email, a welcome email, etc. – getting the message across in a clear and direct way, using language that your customer understands, is key.

That's why we put together a collection of customer email templates designed to help guide your communication strategy. It's important to note that these templates should serve as just that: a guide – not the be-all and end-all. We encourage you to use these templates as a starting point, working in personalization and context to create a genuine, helpful line of communication.

Click Here to Download the Email Templates

Conclusion

As with anything worth doing, leading customer experience change in your organization will prove to be a challenge -- no matter how prepared you are. There are things you'll overlook, roadblocks that'll arise unexpectedly, and circumstances you won't consider until you're in the midst of one.

That's because putting the customer first isn't always easy or obvious. Our track record isn't perfect either. But putting the customer first is worth doing. And it is all about making your customers more successful, building relationships by doing the right thing, and focusing on the long-term even when it's not the easiest path.

"If you aren't thinking about how you can nurture your customers into promoters, you're missing out on the biggest marketing opportunity in years, and severely limiting your opportunities for growth," urges HubSpot CMO Kipp Bodnar.

If that's not reason enough to keep moving forward, we don't know what is.
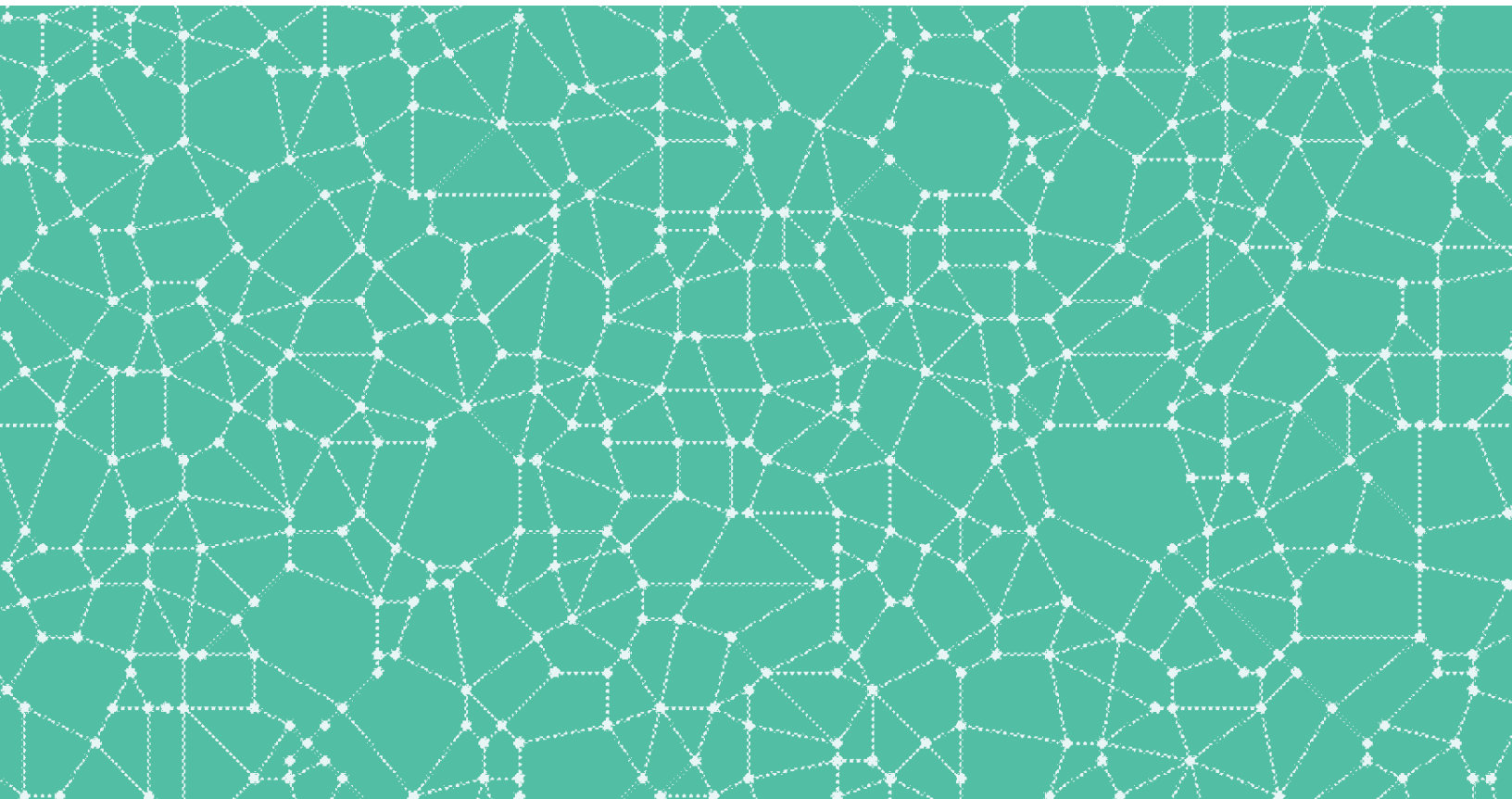
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