HubSpot calendly

How Best In Class Companies Build Customer Loyalty

A guide to improving your customer relationships by aligning processes around the customer journey

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Introduction

Marketing, sales, and customer success teams are more focused than ever on creating better customer experiences. Brands that put customers first and treat them with empathy improve their chances of winning and keeping their business. Why, then, do so many teams still struggle to build great relationships that drive revenue and retention?

Measuring team goals individually causes many organizations to miss the big picture: creating consistent relationships with customers that prioritizes their experience. Every touchpoint, from the first meeting through renewal (and beyond) impacts the relationship with your brand. Clear, cohesive, and *cross-functional communications strategies* help best-in-class teams ensure empathy never turns into empty promises.

In this ebook, we'll talk about end-to-end customer journey planning, how to identify areas for improvement, and provide guides to help you make immediate improvements to create cohesive processes across every team.

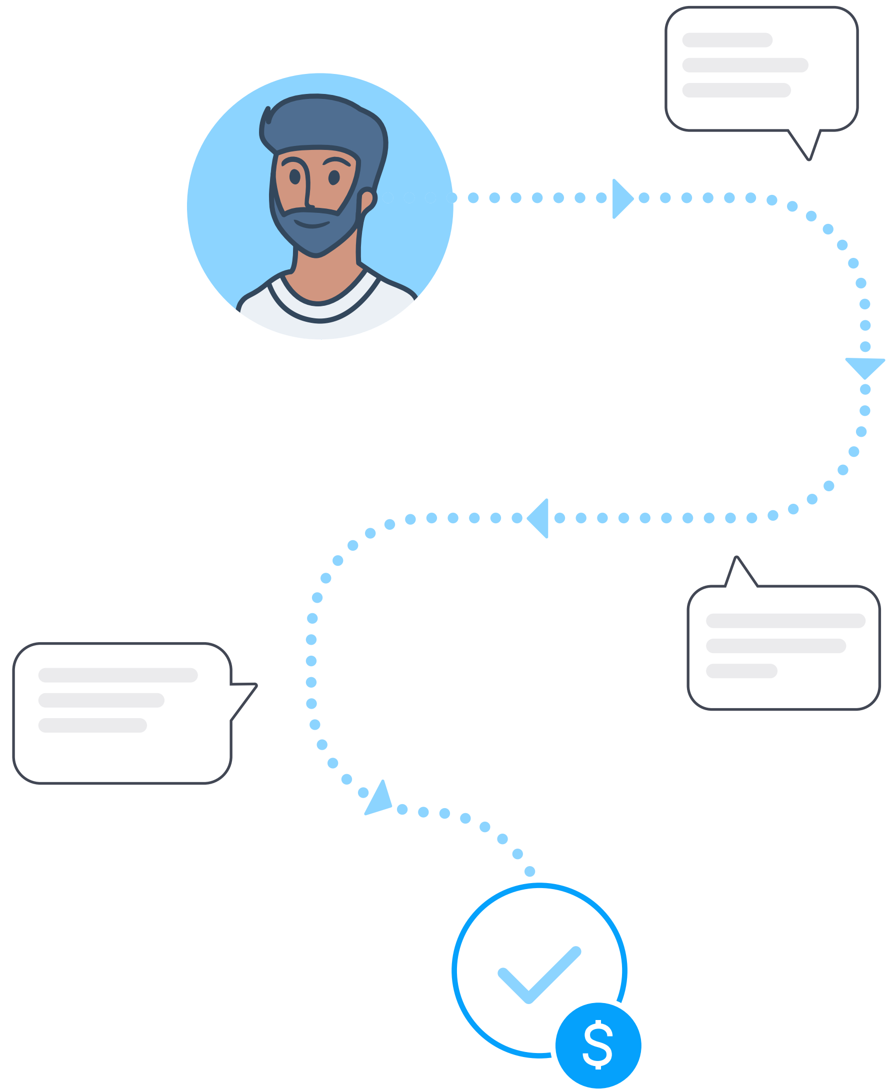
Our mission at Calendly is to help teams grow revenue and improve retention by scheduling more successful meetings, more often. HubSpot helps marketers grow traffic, convert leads, and track progress through their entire flywheel.

Integrating Calendly with HubSpot helps you communicate with customers, enables your employees to work better, and creates visibility around every meeting so you can build better customer relationships.

Empathizing with your buyer experience

Customer journeys are becoming increasingly nonlinear. Handoffs between teams don't happen just once: marketing is present throughout (and beyond) the customer lifecycle, customer success and support step in during the sales process to help with trial accounts and user questions, and sales can re-enter to assist on upsells and cross-sells, renewals, and sometimes to help keep customers from churning.

This can help teams focus within their areas of expertise, but without simple handoffs, clear communication, and a cohesive tech stack, your buyers and customers can feel unfocused and unclear on how to navigate their relationship with your company.



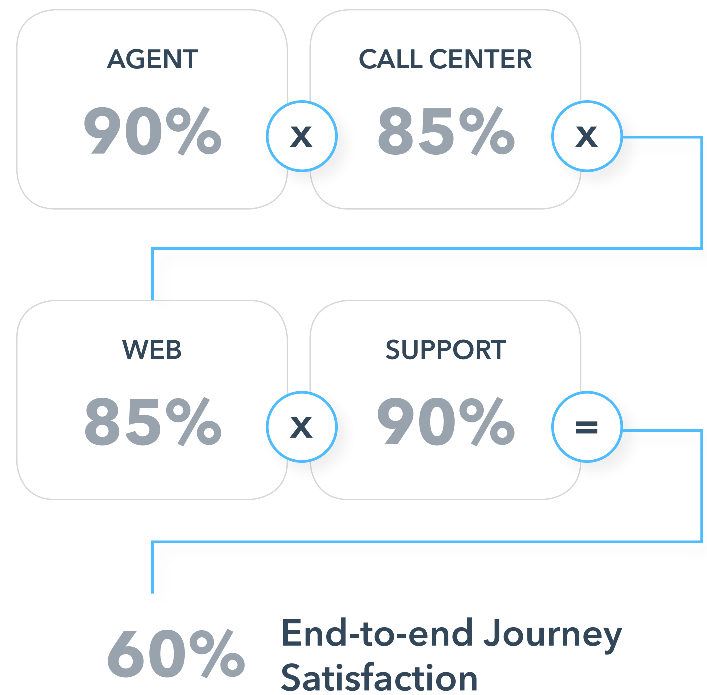
Your customer relationship is a journey

Customer relationships are only as strong as their weakest point. Loyal customers are born out of consistently excellent engagements: everything “clicked” in that first meeting, and everyone who has worked with their account since has provided the same great experience. Creating great relationships requires teams to view the experience cohesively, understanding the journey from the customer standpoint, so they can deliver consistent value that drives loyalty.

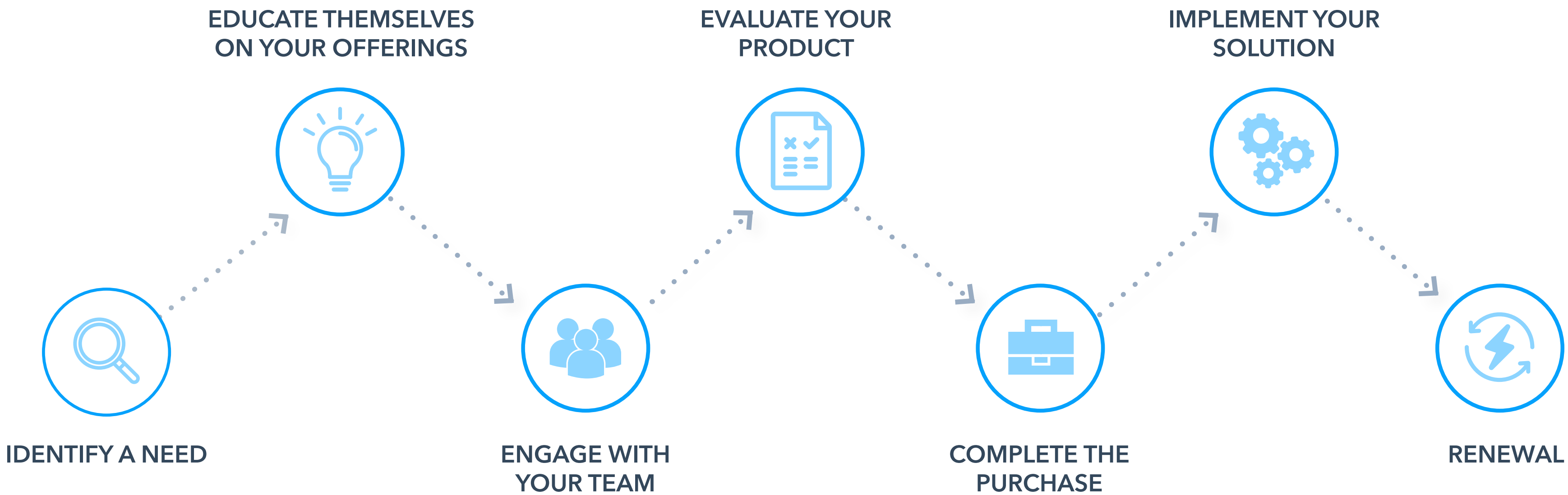
Because the customer journey is generally viewed as linear, team workflows and KPIs are designed to measure the efficiency of individual interactions and how these help move the customer through a particular team’s funnel. This aligns each team around getting customers to purchase or adopt your solution, but it ignores how your customers realize value and how they experience the relationship as a whole. This often leads teams to make siloed decisions around process, best practices, tools, and SLAs.

Consider this example from McKinsey that highlights how focusing on individual interactions detracts your focus from the quality of the relationship as a whole and how it can be misleading in terms of understanding customer satisfaction:

Touchpoint Satisfaction



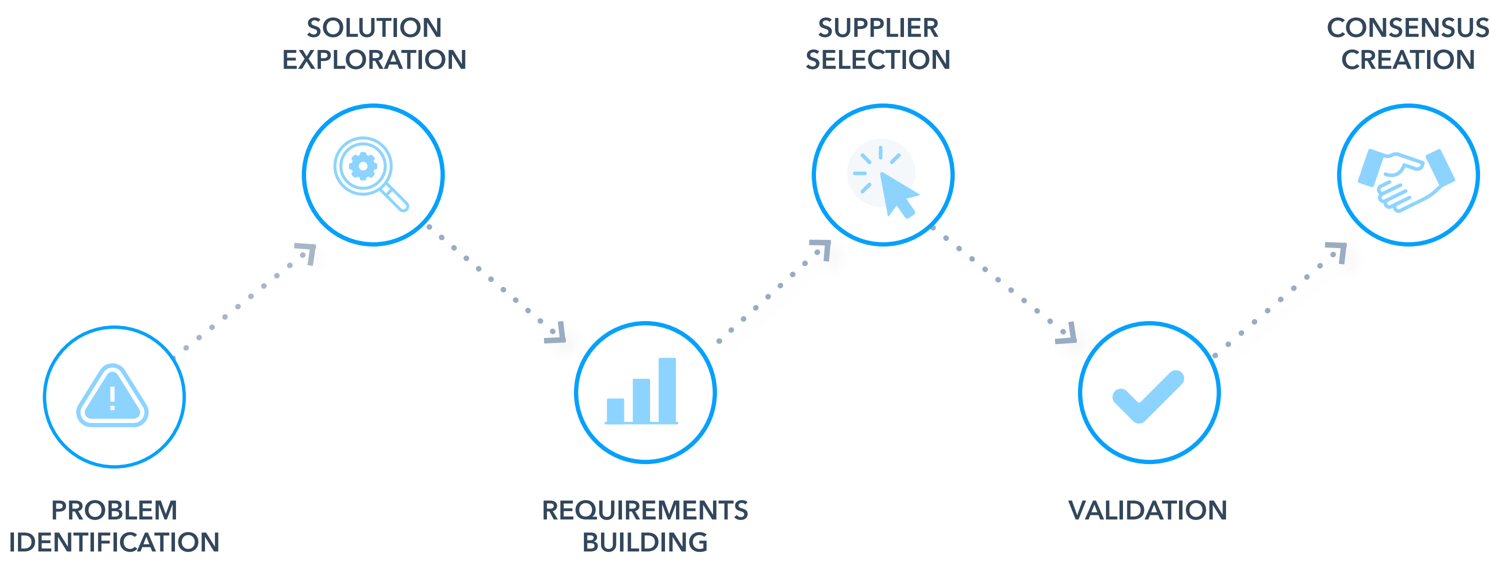
How many organizations view the customer journey



To start driving customer loyalty, consider the key phases of the customer journey in terms of what they have to accomplish and how you can make that process easy and delightful, rather than how you can continue to attract, sell, and retain customers.

How sales impacts the customer relationship

How sales manages their leg of the journey is critical to functional alignment across the entire experience. Sales is often the first to put a face (and or voice) behind your organization and it's important they have a clear process to proactively guide the buyer, coaching them through the stages of the buyer's journey to purchase. Where this goes wrong for many teams is a focus on moving buyers through their sales opportunity stages, which are generally less customer-centric and put sales in the perspective of "qualifying and closing", rather than "helping to purchase".



Validation research (research that supports adoption of your solution) and **consensus creation** (ensuring every individual that is part of their purchasing team agrees on vendor selection) start during requirements building and happen in the background through the rest of the process.

Teams that design touchpoints to specifically help the buyer navigate these goals effectively close more deals, faster, and create more satisfied customers at the time of purchase. This sets the stage for a better handoff to customer success, so it's an important perspective to help you improve the entire journey.

According to Gartner, customers who perceived the information they received to be helpful in advancing them across these nonlinear buying jobs were 3x more likely to buy a bigger deal with less regret.*

Discovering ways to improve relationships now

Your customer's relationship with your company doesn't start and stop when they transition from one internal team to the next. Loyal customers always know what they can expect at each stage of their relationship with your company. Best-in-class companies *identify and fix the areas where there is most likely to be a communication breakdown* and focus their efforts on ensuring expectations are consistent across teams, delivered up front, and always met.

The most likely sources of potential breakdown are the first call with each new team, which can often happen during handoffs between different functional groups. Differences in how each department communicates with buyers causes relationships to backslide or lose momentum, and customers can become frustrated with changing dynamics that are out of their control.

Your best customers remember the positive experiences that added value for them:

- The salesperson who helped them quickly navigate the purchase process
- The onboarding rep who ensured their implementation was successful and on schedule
- The support rep who prioritized meeting with them to solve their unique challenges
- The account manager who's always accessible to make sure they're getting the most out of their subscription

Looking for breakdowns in your process

The first step is understanding the journey from your customer's perspective and identifying opportunities to make their lives easier. Consider their experience and look to see if they're impacted by any of the following:

- Operational inefficiencies (eliminate extra steps that add no value to the experience)
- Barriers to communication (provide multiple channels through which customers can connect to the appropriate person on your team when they need them)
- Internal communication problems (improve data recording and sharing so you can eliminate errors in customer expectation setting and repetitive conversations)
- Areas where customers go dark or the relationship loses momentum (meetings that aren't properly structured and customers' needs aren't met)

Also, think about whether your customer-facing teams are using different communication tools, style guides, or anything that would complicate how customers relate to or connect with your teams. Inconsistencies that may seem small to you can negatively impact the ease of meeting with your teams and can create barriers that lead to larger breakdowns.

The most common reasons why customer experience initiatives fail*:

1. No real vision for the future state, just a desire to "improve quickly"
2. Not a top-3 priority for the CEO
3. No understanding of what it will be worth to the business if fixed
4. Operating off of assumptions about what the problems are rather than focusing on the things t hat matter the most to customers
5. An imbalance between long- and short-term projects to meet goals and ensuring both go well
6. Too narrow of a view of what constitutes the "experience"
7. Don't look to new industries or solutions to solve the problem(s) in the most innovative ways

Preparing for changes to your process

Without a clear framework for managing change, it's easy to get in over your head and lose sight of what you're trying to impact. With process changes to your customer journey, it's important to continually revisit the customer's perspective. By ensuring your changes are aligned with the following, you'll simplify your decision-making and ensure you're not over-complicating changes to your process:

- Do the simple, human thing well during every meeting: Make coordination seamless, set agendas, qualify, come prepared, follow-up, set expectations for what will come next, and make sure that next step is accomplished
- Ensure each step of the customer journey adds value and progresses the relationship. Focus on having impactful meetings that get more done and move the ball forward so customers never feel their time was wasted
- Eliminate the mistakes and delays that not only prolong reaching the customer's desired outcome, but cause them to feel frustrated and deprioritized

To balance these priorities and fix them quickly, measure what is and isn't working and take the path of least resistance to make changes by using technology to scale how you operate. Before starting any change-management projects, ensure leadership is committed to improving the customer experience.

It’s critical that every individual department is prepared to invest in relationships. You’ll have to implement scalable processes across every team that directly impact and improve the customer experience. Without consistency, the *journey* won’t improve and you can’t grow loyalty. Set inter-departmental goals to align marketing, sales, and customer success around improving retention and creating more successful users together.

A great starting point for incremental change is to look to your best reps and understand what they do to add value throughout the process. Scale how they work to the rest of the team to continually raise the bar on excellence.

To determine the biggest opportunities for quick-wins to improve relationships, consider your customer-facing meetings: what is this experience like for your customers, and what are the goals and outcomes? If each step and activity isn’t built with the end-user experience in mind, think about how to re-orient each milestone so that it benefits your customer.

Guides for teams investing in great customer relationships

We've provided checklists to help you evaluate the lowest effort, highest impact changes that you can make today to create loyal customers through better cross-functional processes. You'll learn how to identify areas to improve how you communicate and make decisions about tools to support your changes.

There are three key things to keep in mind when considering end-to-end customer journeys*:

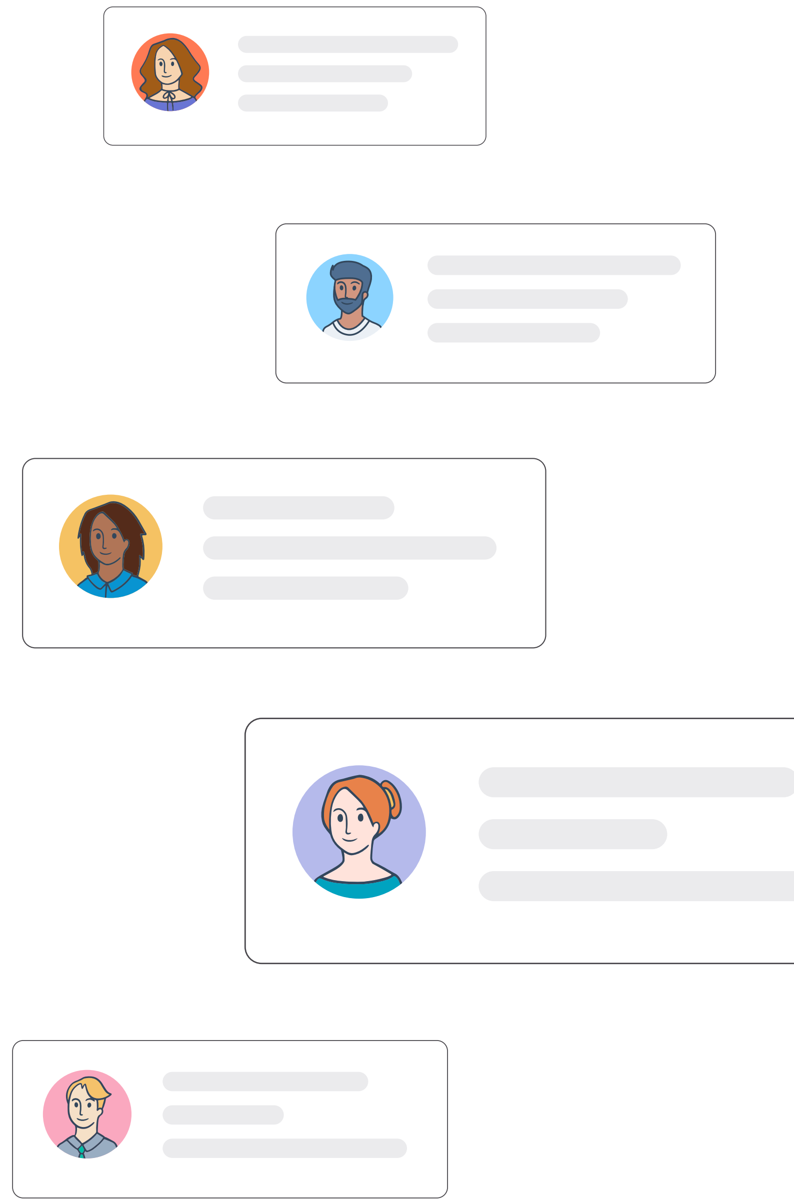
1. Measure the experience at the journey level (customer satisfaction during individual interactions isn't indicative of satisfaction with the relationship)

2. Invest in technology that can capture customer interactions and feedback constantly across multiple channels into comprehensive, role-specific dashboards. *(Integrating Calendly with HubSpot ensures your system of record reflects every meeting with every contact so you have the most complete information about each customer's journey)*

3. Cultivate a continuous-improvement mindset that uses feedback from employees and customers to change the design of the customer experience process

As you read through this guide, don't lose sight of the simplest way to improve relationships: **better communication.** Loyalty is won and lost in how you consistently deliver valuable and delightful experiences to your customers, through better meetings, meaningful follow-up, and proactive conversations.

Come prepared for every meeting (and ensure your customers are prepared, too), jump on a web conference at the moment they need you, and provide helpful information to keep your customers engaged. If you can consistently do all of these things with a customer-first mentality your relationships will quickly improve.



> **"One prerequisite for functional alignment among groups is solid understanding on all sides of processes and expectations. A formal plan and process for servicing customers during this period provides an essential framework for communication overall."***

Getting started: What are you doing today (and why)?

Map the different stages and KPIs across the entire journey based on how your marketing, sales, and customer success teams separately measure progression and determine the following.

1 Do these steps support the buyer's ability to make a confident purchase quickly?

» Does marketing help buyers evaluate the solution and provide clear CTAs that eliminate barriers to communication and connect them with the right person quickly?

» Does the sales process support the journey from the buyers' perspective? (Do you use meetings as a tool to proactively work through the Validation and Consensus Creation stages? Does every sales meeting serve the goal of increasing buyer confidence in your solution?)

» Are you providing a clear vision of how they will get to their future state? (Are you clearly communicating expectations for onboarding, implementation, and ongoing account management?)

2 Do these steps create a consistent experience that will keep the customer engaged?

» Is there a clear, quick, and effective handoff between sales and customer success that articulates the customer's use-case, goals, and unique needs?

» Are you introducing a project plan for implementation and getting buy-in from your customer? Are you structuring meetings in a way that ensures accountability?

» Can customers easily access the right person on your team quickly when they have account questions or need assistance?

» Do you proactively communicate with your customers after onboarding, and do these communications provide value that will help the customer getter better use out of your product?

Next: Learn from your customers (and your employees)

Schedule interviews with current customers, former customers, and buyers who didn't purchase. The goal is to understand what impacted their decisions at each stage of their journey so you can understand the experience of working with your team.

- » **Areas of inefficiency** (e.g., delayed handoffs, missed calls or difficulty connecting during scheduled meetings, steps that aren't valuable to your customer, poor internal information sharing)
- » **Lack of communication** (e.g., poor follow-up on inbound leads, delays in follow-up or scheduling that extend sales processes, breakdown between sales and CX, lack of proactive communication to active customers)
- » **Lack of knowledge** (e.g., buyers that are uninformed about product capabilities or product improvements, or did not know how to build internal consensus to complete the purchase)
- » **Where you communicate well with customers,** and how the tools and best practices that create great experiences can be scaled to every rep and replicated across every team

PRO-TIP

Your internal employees are a great resource to understanding problems in your process. If a step or activity frustrates your team, it's often because they don't feel there is value in it, or they feel that customers don't react well to the process. Take time to dig into their thoughts and feelings, and don't forget to repeatedly ask, "Why?" to get to the core of what makes these experiences negative or ineffective.

When you evaluate systems, ensure you're always choosing the solution that gets as close to the customer experience as possible with the lowest overhead to implement and highest reward. Get buy-in from each team to consistently use the same systems (wherever possible). Best-in-class teams are able to pivot quickly to improve their processes because they choose systems that give them:

1. Flexibility
2. Scalability
3. Low cost

Learn more about simple hacks to make every meeting more effective →

Checklists for each team to change their process to improve customer loyalty

Checklist: Marketing

Your buyer has already done enough research to know they need to speak to a salesperson to evaluate further. Delayed handoffs, long back-and-forth exchanges, and miscommunications in scheduling don't just delay your ability to qualify and close the customer: they detract from the optimism in your team's ability to ease their pain, and they cause potential customers to opt out before going through the buying cycle.

PRO-TIP

Integrate Calendly + HubSpot, then add Calendly scheduling links in your HubSpot emails and landing pages to allow contacts to schedule directly from your marketing campaigns. Calendly will create or update contacts and activities in HubSpot so you have more meetings and better intelligence.

Goals: Improve CTAs and workflows to connect buyers with the right person at the height of their interest, improve communication, and reduce friction in the sales handoff

- Provide simple and clear CTAs in all marketing communications to improve conversion from all marketing sources to create a better buyer experience
- Allow interested prospects on your website to schedule discovery calls immediately
- Create a seamless handoff from marketing to sales, cutting out steps to schedule and route leads wherever possible
- Capture qualifying details from inbound leads to help sales have better initial conversations
- Set proper expectations on the duration, format, and goals for the first sales call
- Put clear CTAs in customer marketing materials that provide information about new features and upgrades that route calls to the right person

How to: Convert more interested leads directly from your website to your sales team →

Checklist: Sales

Understanding more about what your customer needs to accomplish internally for their buyer journey to be successful and actively guiding that process will help you build better trust and stronger relationships, quickly close more deals, and keep buyers from going dark.

How to: Accelerate your sales pipeline by removing the back-and-forth scheduling emails that derail sales cycles →

Goals: Improve the SDR-to-AE handoff, create a buyer coaching plan with clear meeting milestones for accountability, streamline and improve the handoff to customer success.

- Create a scalable meeting strategy designed to hold your prospect accountable for managing their buyer journey, and always proactively schedule the next meeting to accelerate the sales cycle, improve win rates, and increase satisfaction with your sales team
- Minimize disruptions in the SDR handoff process by eliminating back-and-forth emails and helping prospects schedule with the account executive, eliminating confusion in the lead handoff process
- Reframe meetings that you think of as “qualification” to “building and confirming requirements”
- Reduce “check in” or “reconnect” meetings by always providing a clear agenda prior to the conversation that is intended to help the buyer check more of their boxes
- Send reminders prior to, and follow-ups after, every meeting to ensure the relationship stays on track
- Prioritize updating account records with new contacts, activities, and any context that will help your success or marketing teams improve their legs of the journey--not just sales qualification or opportunity data

Checklist: Customer Experience (CX) Teams

A successful handoff call where you reiterate their goals, use-case, set-up, and requirements in your solution is important, but you also need to keep the implementation on track to ensure they feel they're actively, and quickly, working towards their ideal state

Customer success teams often have the most individual opportunities to improve customer relationships because they have the most complex, and ongoing, relationships with customers. CX teams serve many customer needs, so simply being available and accessible at the moment they're needed can be the best way to improve satisfaction over time.

Goals: Quickly and proactively schedule effective sales handoff/ onboarding kickoff calls, ensure there are correct expectations and accountabilities for the complete implementation process, verify customers are using your solutions effectively, make sure customer feedback and questions are consistently heard, communicate effectively around renewals and upgrades.

- » Create a strategy to clearly communicate all relationship history and customer use-case details from sales to CX
- » Simplify how new customers schedule the first onboarding call to ensure it happens as closely to the sale as possible
- » Create a shared onboarding plan with all roles, responsibilities, and time commitments. Share this with sales so they can set proper expectations prior to close and get agreement from your new customers on the first call

- If implementations take multiple steps, ensure the next call is scheduled as soon as the prior call ends
- Put scheduling links in your CX reps' email signatures to reduce friction for customers and help more of them reach out for account assistance
- Allow support reps to jump on live calls quickly with customers on an as-needed basis to solve unique or urgent technical issues
- Send invitations for quarterly or semi-annual account check-ins with customers

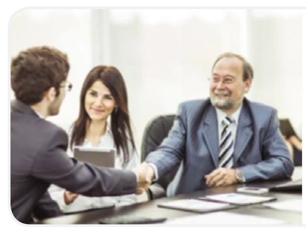
"The onboarding period sets the tone for everything that comes after," he says. "If you start poorly, it casts doubt on everything. If you knock their socks off, they will want more."*

How to: Have more effective customer onboarding meetings every time →

Resources

Customer Loyalty: The Ultimate Guide

27 Interesting Stats About Customer Loyalty You May Not Know



8 Customer Loyalty Trends To Follow In 2019