



CUSTOMER EXPERIENCE

# From noise into harmony: Orchestrating a transformative customer experience

If you've ever experienced a world-class orchestra perform live, you know how it sounds (and feels) when chaos transforms into harmony.

Picture yourself before the performance: seated in a plush chair, chatting with a companion. As the lights fade, a single tone emerges. It's joined by another, then another, then countless more, all from different instruments, coalescing around one note. The orchestra is tuning, warming up. Imagine how unique that sound is and how satisfying it feels to be pulled from random noise into complete harmony.

When leaders talk about evolving the customer experience, that sensation is exactly what they want their customers to feel: harmony. But achieving harmony requires much more than simply working from the "same sheet of music."

## Introspection only goes so far

### Common goals, different KPIs

The customer experience touches every part of the organization, from sales and marketing to finance and IT leaders—each with distinct, yet complementary goals they hope to achieve. Take return on investment as an example. While finance and IT may be considering ROI at a high level (i.e., Are the systems and technologies we've invested in impacting the bottom line?), marketing and sales are often more tactical about it (i.e., How many leads did we get from that campaign?).

That means marketing is looking at which activities are moving the needle (and which aren't), so it can more effectively apply budget in the right places. And sales is examining which opportunities in the pipeline will benefit from more attention, increasing the likelihood of lead conversion to a signed deal.

What about some common customer experience goals? While sales and marketing are analyzing if messages are consistent and aligned, finance is looking at the lifetime value of customers and IT is assessing whether its current systems can support campaign activities across multiple channels.

Yet while ROI, productivity, and effectiveness are all important goals, the ultimate measure of customer experience success lies in the ability to not just acquire and retain customers—but to deliver a level of engagement that turns them into loyal, long-term brand advocates who speak with their wallets.

### Trendy vs. Traditional

Some organizations are pouring resources into innovative trends, such as artificial intelligence (A.I.) and conversational user experiences (i.e., everything from Alexa and Siri to simple online chatbots). In fact, by 2025, an estimated 95% of customer interactions will be supported by A.I. technology.<sup>1</sup>

### Poor customer experience by the numbers

- 27% of customers will stop doing business with a company if they receive poor customer service.
- 54% will try a new brand or company for better service.
- 60% will tell others about a bad experience.<sup>2</sup>

To get anything out of these initiatives, however, you have to go beyond simple interactions like “if you like this, you'll like that.” If the technologies aren't adaptive or nuanced enough to recognize customers' behavior and predict when they're unhappy or predisposed to go elsewhere, they can actually jeopardize engagement rather than support it.

Other companies are trying to evolve traditional channels, such as email, print, and ads, and integrate them with exploding digital channels like social media. They're thinking, “email's not dead, but it has to be more dynamic and engaging than the usual ‘Dear [insert first name]’ approach of the past.” For example, what if an email offer could consider customers' demographic and transactional data, campaign history, etc. at the time the email is opened and automatically serve up the most relevant message based on predictive models and self-learning A.I.?

On top of figuring out how to incorporate trends like these, companies in every industry are increasingly ranking customer experience as their most critical initiative—which means the race is on to evolve fast and create competitive advantage. However, while 81% of companies recognize customer experience as a competitive differentiator, only 13% self-rate their CX delivery at 9/10 or better.<sup>3</sup>

So, everyone agrees that delivering an excellent customer experience is critical. It's just not happening. And the consequences of failing to meet customers' expectations can be costly—to both your business and your brand.

## Issues interrupting CX transformation

So, if most companies get the importance of customer experience and are already dabbling in new trends, such as A.I. or dynamic emails, why are so many of them not achieving the transformational success they imagined?

One reason is that the multitude of systems and processes across finance, marketing, sales, and customer success that support the customer experience are not effectively integrated—nor do they measure a common set of KPIs that roll up into larger, organizational success metrics. And this lack of integration can happen both across and within departments.

When systems and metrics aren't integrated, it also creates issues with reporting, which often has to be done manually in spreadsheets. This is not only inefficient and time-consuming, but also prevents visibility and real-time sharing of key metrics across departments—which hinders the ability of each group to align on key customer experience initiatives.

For example, marketing might be measured on volume of leads coming into the pipeline rather than quality, which could mean sales wastes time on bad leads that aren't likely to convert. Then within marketing, you might have a social team being measured on hearts and likes competing with a marcomm team that's measured on click-throughs and downloads—all of which can result in prospects and customers being bombarded with confusing messages.

To continue the symphony metaphor from earlier, this is the sound of instruments loudly playing over each other, despite being part of the same song.

### Surveyed companies rated their top three CX challenges as:

1. Systems not integrated
2. Channels operated in silos
3. Inconsistent data across channels.<sup>4</sup>

## The misguided “one throat” mindset

Many companies see this lack of integration and think looking inward will help. They try to nail down who owns the customer experience, perhaps even hiring a Chief Customer Officer or putting together a dedicated CX team, so they have “one throat to choke” for this critical initiative.

They look for quick opportunities to automate and integrate data; for example, between a marketing automation platform and a CRM. Then, try to identify internal process improvements that will enable them to provide a holistic, predictable experience to customers regardless of where they are in their buying journey or with whom they're engaging at any given point.

However, there are a couple of problems with this kind of inward approach. For one, most organizations are too complex for a “one throat” structure to work. It's an unavoidable fact that customers will engage with numerous people in your company throughout the relationship. So, it should be more about empowering each group to understand customers' expectations and affirm that they're being met, rather than trying to operationalize hand-offs that funnel customers through the same process, regardless of need or channel preference.

Secondly, the inward approach often results in an overly prescriptive buyer's journey that “pushes” what action you want the customer to take at each stage, as opposed to “listening” to their needs and reacting dynamically based on behavior, likely next step, and how/when they prefer to be engaged.

## Examining common CX scenarios

Transforming the CX to fit your customers' ever-changing needs is a large topic that can be difficult to get one's arms around. In such cases, it helps to ground the discussion in real-world examples that your salespeople, marketers, and customer success professionals encounter every day. Read on to explore how a few example scenarios can play out, both positively and negatively, depending on the CX approach.

### A tale of two trade-show leads

While staffing your booth at an industry trade show, one of your best salespeople has several interesting conversations with prospects, two of which she identifies as hot leads. She either enters this information in the system herself or passes to marketing for uploading, where one of two things can happen next:

- As the data is entered, the marketing automation platform syncs with the CRM to ensure effective, consistent follow-up activities take place. This means the salesperson who started the conversation owns the lead and can continue building on the momentum from the trade show. And, marketing now has more information to deliver relevant and personalized content, ensuring alignment across other channels.
- If the marketing automation and CRM systems aren't effectively synced, the lead could be assigned to another sales rep, jeopardizing the momentum and relationship-building that had started at the trade show. And if follow-up marketing content isn't relevant to the conversations that took place in the booth, there is a slim chance this lead will go anywhere.

### Who owns customer experience?

A recent survey by Dimension Data<sup>5</sup> revealed that "ownership" of CX in organizations typically settles in three areas:

- 35.6%—Board executive
- 28.3%—Non-board manager
- 28%—Manager of each contact channel

With no clear consensus on where CX belongs, you may think that's something your organization needs to nail down. But when you think about how companies measure CX success (e.g., Net Promoter Score, customer loyalty, etc.), you realize it's more about how you're executing on it, rather than who owns it.

### Customer sales call surprise

A salesperson has a meeting on the books with one of your best clients to discuss a new product your company has recently debuted to the market. His agenda is thrown out the window when he arrives to find a disgruntled customer who has been fighting with your accounting department over invoicing, payment, and shipping issues related to the products they're currently purchasing from you. What happens next?

If the salesperson had visibility into these administrative issues through the CRM ahead of time, he could have either prepared an item in his agenda to address the customer's concerns or stepped in before the meeting to proactively resolve the issue—ultimately keeping the focus on the new product you want them to buy. Just as with the trade-show scenario above, the core need is integrated systems and data with real-time customer profiles that enable relevant, next-best actions.

## **(Un) timely marketing campaigns**

It's nearly spring, and you want to capture customers' excitement for the season with a campaign that promises fun in the sun—and discounts on seasonal products, of course. The problem is, your bright and cheery emails go out to a region getting buried under heavy, wet snow by a surprise nor'easter. Suddenly, your timely campaign is anything but, and you've risked souring prospects on your brand by effectively rubbing their faces in weather they wish they were experiencing.

To avoid this, you need to ensure that the messages you're sending to prospects and customers can be tailored at the point of delivery to compensate for other factors that might have arisen. For example, what if a retailer could use real-time weather data as a segmentation input for their emails? Or what if a bank's call-center reps could systematically revise offers depending on a customer's mood? You'd be confident that your customers are receiving the most appropriate offers at the precise moment of delivery—when they're most likely to generate revenue for your business.

## **The never-ending quote process**

There's nothing worse than effectively moving a prospect or customer to the proposal stage, drumming up excitement for a solution, then killing momentum with a drawn-out configure, price, quote (CPQ) process. Why does this happen? Could be internal legacy systems adding unnecessary complexity to the sales process, a lack of timely responses to sales inquiries, or even missing or mismatched information in the buyer journey. And your buyers are noticing. In fact, 54% of them say it's taking more time to make a purchasing decision.<sup>6</sup>

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**Only 33% of marketers believe their company does a moderately or extremely good job of converting trade-show leads, contacts, and conversations into customer business.<sup>7</sup>**

**Only 6% of organizations are advanced in implementing their personalization strategy, and lack of content relevancy in marketing campaigns results in 83% lower response rates.<sup>8</sup>**

If your legacy systems and processes are limiting the ways your salespeople and customers can interact during this critical phase in the buyer journey, you not only risk time to revenue and potential cross- and up-sell opportunities, but potentially even killing deals if customers don't feel engaged and empowered by the buying process. Instead, you need to explore how you can provide customers the freedom to co-create the solutions and consume them in a way that's most convenient for their business model via a guided sales experience.

## **Push vs. pull in the customer journey**

The modern B2B buyer journey can span multiple channels, levels, and types of content. And while you can take some cues from general trends—for example, that 74% of buyers conduct more than half of their research online before making an offline purchase—each customer and prospect will interact with your content in the ways and via the channels they prefer. That means you can't just “push” certain types of content or experiences on them because you've determined that's what works best for a given stage in the journey. You have to be more flexible than that.

A good place to start is by marrying the art of customer-journey mapping with the science of marketing automation, which can help modern B2B marketers facilitate, execute, and evaluate campaign plans at scale. This approach not only makes it easier to plan emails, segment customers, manage content, and plan and track each customer's journey, but also enables marketing departments to stay lean, focused, and profitable.

## Transforming CX from the outside-in

If it feels like you're wasting too many cycles and resources on things like determining who owns CX and manually triaging customer data across business units, you might be taking an overly introspective approach to this critical initiative. Instead, you need to look outward into your customers' world, so you can truly understand their behavior and preferences and engage them appropriately.

This means integrating and continually analyzing all data you have about them. Forget about building the fabled 360-degree view; it's impossible. Rather, develop relevant customer profiles for each business unit, so while marketing and sales may see different data in their systems, it's always what each group needs to ensure alignment and meet the customers' expectations at any given step of their journey.

It also means taking fresh stock of your current capabilities in light of your customers' evolving preferences. If there's a specific channel or type of communication that they favor but you don't have effective capabilities around, then you've identified some gaps that need to be filled. This could be a technology, a system, a process, or even a specific functional area.

## Ready to deliver, Maestro?

Ultimately, your goal is to engage all prospects and customers through personalized, relevant, and curated experiences that take into consideration who they are, what they're interested in, and where they are on their journey. Achieving this requires the right tools, expertise, and processes. The bad news is, you may not be able to check the box on each one of these categories today. The good news is, the gap analysis discussed earlier will help you prioritize where you have the greatest opportunity with your customers and can make the biggest impact quickly.

To wrap up the symphony metaphor, evolving your CX from the outside-in means understanding which parts of the song you want to have the most emotional impact with your audience; then using that knowledge to select the appropriate instruments for each moment and guide the musicians' performances to achieve the desired effect.

1 Morgan, Blake, "10 Customer Experience Implementations Of Artificial Intelligence," [Forbes.com](#), February 8, 2018.

2 "[The Cost of Poor Customer Service](#)," The Northridge Group, October 18, 2017.

3 "[Global Customer Experience \(CX\) Benchmarking Report](#)," Dimension Data, 2017.

4 "[Global Customer Experience \(CX\) Benchmarking Report](#)," Dimension Data, 2017.

5 "[Global Customer Experience \(CX\) Benchmarking Report](#)," Dimension Data, 2017.

6 "[The 2016 B2B Buyer's Survey Report](#)," DemandGen Report, 2016.

7 "[Customer Attainment From Event Engagement](#)," CMO Council in partnership with the Exhibit & Event Marketers Association, 2013.

8 "[2017 Personalization Development Study](#)," Monetate, 2017.

9 "[The power of me: The impact of personalization on marketing performance](#)," Epsilon, January 4, 2018.

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