



## To Serve Customers, Understand Them

Create the optimal customer experience through a better understanding of the company's brand and CRM.

By Chris Tranquill | March 12, 2009

Successful companies have a brand or an image that comes to mind when you hear their names. Whether it's Apple Inc., Virgin America airlines or Starbucks Coffee Company, people have a mental impression of the company just by hearing its name. Businesses with strong brands create the same image — and customer expectation — across the board. Everyone in the CRM chain, from marketers to sales teams to service reps, needs to be aware of the company's brand and image during training in order to successfully promote it and meet customers' expectations.

When customer care agents “walk a mile in their customers' shoes,” they create an intimacy with customers that they just can't get from a training manual. Even if customer care agents work far away from their employer's retail store, the new hire training should take them on a tour through the store, if applicable, in order to experience it from a customer's perspective. This is another way to go beyond just being an employee or vendor, but being a partner in the brand awareness and education process. Reinforcing the client environment through paint colors, signage and even lighting throughout the customer care center strengthens the relationship. Branding the call center also creates an environment where agents are immersed in the client's culture and products. If agents feel like they're part of their employer's world, they're much more apt to convey this image to the customers they support.

Relationship with customers actually begin when the marketing team creates the company's image through advertising themes, key messages and price and purchase points. For example, buying something online, versus a discount retailer or a luxury store, implies something about the product and what the consumer expects from it. Once that image is created, it's essential that the rest of the CRM sales and service teams are indoctrinated in that brand so they can meet customer expectations. The marketing staff must ensure that others in the CRM chain are given all relevant materials so they can review them during training and frequently afterward to ensure a consistent approach.

The sales and the customer care teams must be intimately familiar not only with the company as a whole, but also with the specific product. In a perfect world, customer care agents and sales staff would actually use their company's product or shop at the store they are supporting. As a consumer of the product, they have a unique insight into understanding where the customer is coming from. The best companies will actually give their employees the product to use, if applicable, or offer store discounts. At a minimum, agents and sales staff members should have frequent hands-on training sessions. People learn by doing, especially employees who are visual learners. Simulation labs are especially good training grounds, particularly for technology support. Training manuals, Web-based learning and videos are also a good start, but employee indoctrination must go beyond that.

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### Creating a Loyalty Effect

The time and effort invested in this kind of education will create knowledgeable agents who can provide better service and exceed customer expectations. This type of investment can lead to the “loyalty effect.” By increasing customer loyalty, you decrease operating expenses exponentially. Not only is this investment incredibly low-cost/high-value, but when you look at the customer retention versus acquisition equation, it offers incredible ROI (return on investment).

As everyone knows, it’s easier to keep a customer than it is to recruit a new one. For every one customer that complains, there are dozens who don’t — they simply walk away. And it only takes one bad experience to lose a customer: for example, a salesperson who’s not familiar with a product, or a customer care agent unable to successfully address a consumer’s need. If the sales and service staff are trained, use the product and understand it, they’ll get where the customer is coming from, making them more empathetic and better able to help. Education creates that empathy and enthusiasm for the products and ultimately generates retention and loyalty.

This type of employee education and awareness is a never-ending process. Sales and customer care agents must continually be made aware of news and updates about the company and products they support. But it must go beyond knowing about the news; they need to understand how these updates will ultimately affect the service they provide to customers. Training and educating agents on how problem-solving steps have changed or simply what challenges a customer might encounter are simple and proactive ways to make sure customers continue to receive the same great service they’ve come to expect from the brand.

## **Brand Education**

Education on brand awareness starts with new hire training and continues beyond the technical aspect of being a good agent on the phone. It could include a history of the company or product, or an understanding of the brand and image the company is trying to create. Many times there is specific lingo or a certain manner of speaking associated with a brand. Indoctrinating agents to this language helps them further identify with the company’s image. This can easily be accomplished through role playing, displaying key phrases and client pamphlets in the break room, publishing a chapter in the training manual and Web-based learning or videos.

Customer care agents are the face — or the voice — of the company to the consumer. It is therefore essential that they are made aware of news and updates about the company or product, even if it does not directly relate to their position. News and updates should come frequently and regularly in small, easily understandable doses so agents are not overwhelmed or, worse, tune them out. These updates could take many forms — meetings, video clips, slide presentations, Webinars and handouts — but they create an excitement among the staff who will be interacting with your customers.

Managers, directors, supervisors and other back-office staff should interact with consumers of the product for an extended period of time. They could work in a customer care center or in the retail store alongside the sales staff. Even if it is only in a shadowing capacity, they will still see first-hand the customer’s expectations and problems.

This creates a better understanding across the entire CRM system. If marketers ensure that customer care agents are looped in on new campaigns, they are better equipped to serve the consumer. Agents should be able to explain recurring issues they are hearing from customers, both good and bad, to the sales and marketing teams. This allows sales and marketing to play up the good points and anticipate any bad feedback so corrections and adjustments can be made to ensure the optimal customer experience.

Some companies do not go to this length to exceed customers’ expectations. There are plenty of excuses: margins are too tight, it takes too much time, the effort is too great or it costs too much.

But brand awareness training and on-boarding the entire customer care chain must be viewed as an investment. Limiting your brand awareness training to a few posters and slogans isn't enough, either. Agents need to wear your colors, touch and play with your products in both the classroom and on the production floor, and they need to understand the reasons your customers value your brand.

Creating brand awareness is an essential step in promoting a product. Buyers and users of the product must believe in the image that is being created by the marketing team. That image must be reinforced by the rest of the CRM team in order to fulfill the customer's expectations. And in this time of buyers being more selective in using their limited resources, any time expectations are not met could result in a lost customer, lost sales and lost revenue. Brand awareness is just as essential inside the company as it is outside of the organization.

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