5 Pillars of Customer Happiness

A guide to building customer relationships that last

From the team at Synap
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Introduction

Companies that fail to make customer happiness a standard operating principle are more likely to struggle to achieve their overarching business goals and objectives.

We all know making and keeping customers happy is critical to the long term success of any business. So why is it that despite the best of intentions, many companies struggle to
keep their customers happy and enthusiastic about the relationship?

One major reason is because customer happiness is often given short shrift. Many companies make the mistake of paying lip service to the importance of nurturing customer relationships but fail to put in processes and procedures to institutionalize the practice. Is your company struggling with this too?

Incorporating these Five Pillars of Customer Happiness into your business culture, processes, and goals can help you to get on the right path in no time.
Pillar One: Treat your customers like partners

People often say the key to driving customer happiness is to follow The Golden Rule. While we agree that treating your customers how you want to be treated is a good idea, in today’s marketplace, it is too much like table stakes to be considered foundational.
For customer happiness to become a cultural pillar, you need to implement concrete practices around it. Choosing to treat your customers like partners takes you beyond common courtesy and deep into bend-over-backward-because-you-truly-care territory.

You develop long lasting and mutually beneficial customer partnerships by aligning interests and building deep relationships of trust with them. Your partners can’t be successful without you, nor you without them.

Trust doesn’t happen all at once. It is built on shared experiences over time, and requires constant reinforcement. At Synap, we point to three easy-to-remember practices for aligning interests and building trust-based partnerships: Know Your Customer, Eat Your Own Dog Food, and Be Transparent.

Not all that long ago, our team got to know a software company which exemplified these principles very well. Let’s call it GreatSoft. Its story nicely illustrates the importance of building and nurturing strong customer relationships.

**Know your customer**

In its formative years, GreatSoft’s product, engineering, and sales teams were judicious in building strong relationships with their customers. The company devoted time to learning the ins and outs of the industry in an attempt to better understand the mind of their end users.

“When we first signed up with GreatSoft, it felt like we were partners.”
They frequently sent representatives from every department to meet with and solicit feedback from users at each stage of the customer life cycle. They even spent time with customers who had churned away in order to better understand where they had failed. This not only helped them to improve their products and services but enabled them to keep the door open to the possibility of winning them back.

In time, GreatSoft, and many of the people who worked there, became known as influential thought leaders in their industry.

**Eat your own dog food**
GreatSoft also made a point of using their own software. This enabled them to broaden their understanding of the industry and to develop a better understanding of the underlying pain points their users encountered in doing their jobs. That approach helped their customer facing teams to build greater credibility with users and earn their professional respect.

GreatSoft even went so far as to treat itself like a customer for technical support, bug fixes, and feature requests. In so doing they subjected themselves to the exact same experience as their customer. This helped them to identify weaknesses in their on-boarding and support processes and to quickly improve things when they found points of friction.

**Be transparent**
GreatSoft also made a point of not only sharing the product roadmap, but also their entire product design strategy. Doing so helped them to be more efficient in prioritizing product
features across their rapidly growing customer base. Aside from being open about the direction of the product, they also made it a point of company pride to talk about where they wanted to take the business over time. This included how they saw their business growing with their customers. It also meant they were transparent about their financial objectives. That level of openness made talking about money much easier and kept their customers from feeling like an ATM.

In a few years GreatSoft became the dominant brand in its niche. They were the best at what they did, had built rock-solid customer relationships, and were minting money.

And then they completely blew it.

Within a couple years of reaching its zenith of success, GreatSoft found itself hemorrhaging customers and revenue, not to mention many of its best employees.

In the end it was sold for a fraction of its former value to a younger competitor who migrated the remaining customers to their own platform and shut down GreatSoft's product.

A few themes surfaced when stories from insiders and former customers surfaced about why the company fell so far so fast. One telling piece of customer feedback reads: “When we first signed up with GreatSoft, it felt like we were partners. The guys were responsive and genuinely interested in our business. They charged a premium but we felt like it was
worth it. By the time we switched providers, GreatSoft had become a totally different place. It was like Jekyll and Hyde.”

In the minds of customers and employees, things fell apart when the company’s leadership allowed their culture to shift away from customer relationships and product innovation. The result was that the product quickly fell behind, and customers lost faith in the company’s ability to deliver more than the next invoice.

Don’t let this be you. Build your business around the principle that your customers are important partners. Strong partnerships built on trust are your greatest insurance policy against failure.
Pillar Two: Manage Expectations

Managing expectations is hard. Customers often have wildly different assumptions about how their relationship with you should work. They have expectations for how they’ll be sold, how you will implement your product, and how you will engage with them to make the relationship a success.
To make matters more difficult, expectations tend to become more demanding over time and frequently go unstated until they aren't met. This is due in large part to the fact that expectations are influenced by past interactions.

Despite how challenging it is to meet customer expectations, doing so is critical to the long term success of your relationship. That's why we consider it to be the second of our 5 Pillars of Customer Happiness.

Take a moment to Google, "managing customer expectations."

What did you learn?

"Most of the advice we're given about managing expectations lacks substance."

The Internet tells you that to manage customer expectations you need to do important things like get a grip on priorities, communicate consistently, stay organized, and under-promise and over-deliver. We completely agree with all of those points and would posit that most other people do, too.

Still, at Synap, we can't help but feel like most of the advice we're given about managing expectations is lacking in substance.

Think back to your most positive experiences as a customer. How many times are your pleasant associations directly related to your expectations having been completely met?
We would wager that the positive experiences you had weren’t anomalies. Companies that are great at delighting customers make expectations management a firm-wide priority. They wow customers by taking advantage of every opportunity to meet and exceed expectations with every interaction. They understand the relationship between experience and expectation and endeavor to control both.

Making expectations management a company-wide cultural pillar forces you to go beyond the buzzwords and do two very important things. First, to determine what a reasonable set of expectations for each customer touchpoint should be and second, to implement a standard of service around each one.

By doing this, you make it possible for your teams to anticipate customer expectations with every interaction. Being in the driver’s seat makes it much easier for you to continually exceed your customer’s expectations.

**Create the playbook**

How do you go about determining what a “reasonable set of expectations” should be? One way is to create a detailed customer expectations playbook. A playbook – or whatever you choose to call it – is a set of written guidelines that articulate how your company behaves, and what it does for customers at every stage of the lifecycle.

The sole purpose of the playbook is to help your teams, and then your customers, understand the who, what, when,
where, why, and how of your relationship at every major touch point. It doesn’t have to be a 500-page policy book but it should cover all the bases. The best ones tend to be brief but concise, taking up a few pages per customer-facing department.

One way to start putting a playbook together is to map out your company’s customer relationship lifecycle. For example, let’s pretend yours can be broken into five stages: attract, convert, implement, service, and leverage. Once you’ve identified your stages, assign them to the functional groups that shoulder primary, secondary, and tertiary responsibility for the relationship at each point.

### Myco, Inc. Customer Relationship Lifecycle

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Maybe your marketing team has primary responsibility for the “attract” stage followed by sales (secondary) and customer success (tertiary), whereas the “convert” phase is owned by sales, with marketing and customer success in supporting roles.

Once you’ve clarified ownership at each stage, the next step is to map out the customer interactions that occur as the relationship unfolds. Think about the kinds of expectations your customers should have of you at each point and the corresponding experience that should follow.

Continuing the example, when examining the “attract” stage, you need to determine how many times, via how many channels, and in how many ways your company interacts with a prospect. Take into account all of the activities you do to call attention to your brand and consider all of the traction channels you’re employing to create awareness.

Is your marketing team creating product expectations that set your on-boarding team up for success? Is the service-level agreement (SLA) your sales team is promising prospects in the “convert” stage consistent with what your technical support team can actually provide? If individual teams are introducing friction into the relationship it is exponentially harder for the whole company to achieve desired outcomes. Building a playbook that spans all customer facing departments helps ensure alignment.
Establish service standards

Don’t be alarmed if you end up with a long list of potential friction points. That’s kind of the idea! The more thoroughly your playbook is mapped out, the better the experience you create for your customers and the more control you gain over their future expectations.

Once you’ve mapped out your customer engagement points, you can get to work building a standard of service for each one. As you create standards, patterns begin to emerge in the types of service you can provide to achieve a desired outcome.

Use those to boil everything down to a small number of precepts you can apply across the entire company and then build all of your expectations standards on them. Team-specific processes and guidelines can then be built on top of those universal axioms.

As we all learned in preschool, sharing is caring. So once you’ve developed your playbook make sure everyone in your company learns it and knows how to use it. In our experience, it is much easier to benefit from the helpful advice on the Internet about getting a grip on priorities, staying organized, and under-promising and over-delivering when your teams are armed with a playbook. A playbook helps teams adhere to the customized standards that are most important in delighting customers.

“Most companies won’t make the investment which is precisely why yours should.”
This may sound like a lot of work, and truthfully, getting it right does take serious effort. But the investment pays for itself, resulting in more satisfied and valuable customers.

Sadly, most companies won't make the investment which is precisely why yours should. Don't stop at building better products than your competition – build better relationships that will stand the test of time.
Implement customer feedback

Loyal customers are more than frequent buyers; they are also brand advocates. They develop an emotional investment in your company which you strengthen when you share your roadmap and product development process.
Sharing means more than just letting customers know about your future plans though. By including your customers in the conversation you reassure them that you have their best interests in mind, are committed to an ongoing business partnership, and are developing solutions to address their needs.

Of course, you do have to actually incorporate their feedback into the roadmap, but that is most effectively done by sharing the roadmap and then revising it in an understandable and predictable manner.

Customer feedback is a gift. Of course, the problem with gifts is you don’t always want the item under the wrapping paper. Customer feedback is no different in this regard, but handling it well can result in happier customers and a better product.

“A few lifetimes ago, a customer was beta testing a new platform one of our teams had just launched. As is often the case with new products, it had way more bugs than it should have, and the customer was livid. He called up one of our teammates and shouted as loud as he could: “Do you know who I am? I WILL SINK THIS PRODUCT!”

Every time our colleague tried to say anything he would cut him off and berate him. He practically vomited out a sentence our team will never forget: “Do you know who I am? I WILL SINK THIS PRODUCT!”
We didn’t realize it at the time, but the feedback we had just been given was a Stinky Turd. The experience was unpleasant (to say the least) but it wasn’t without value, and it’s one of the four types of feedback customers often give you.

**Shiny Toy**

Sometimes you get customer feedback that’s just what you wanted. Receiving a heaping pile of praise from a customer who loves your product feels like opening that shiny new toy at your 5th birthday party. The giver and receiver both feel great about the situation, and celebrating success can help cement an already solid customer relationship.

*What to do with it:*

Thank your customer for the warm feedback and give yourself a pat on the back. And don’t forget that kindergarten rules apply: shiny toys are meant to be shared with others. So let your teammates know about the great feedback!

It takes huge effort to get a product right, and you should celebrate those moments. Shiny Toys are also important because they let you know what you’re doing right, so you can continue doing them well.

However, while this feedback definitely feels the best, it’s important to remember that it usually can’t actually help you improve your product. You need the other types of feedback for that.
Ugly Sweater
It’s wonderful when a customer cares enough about your company that they can’t wait to share their fantastic new idea for your product, but it gets tricky when their ideas don’t sound so great to you.

Maybe the idea is too specific to their situation, doesn’t fit with your product vision, or would cost far more to develop than it’s worth. Just like when you received that heinous hand-knitted holiday sweater from a beloved relative, you want the giver to feel good about their gift without actually having to use it.

What to do with it:

You owe it to the customer to give their idea a fair shake, whether it’s just digging in and asking good questions, or submitting the idea to a formal evaluation process.

Don’t forget to make sure your customer can see that their suggestion had a fair chance. Explain the steps you took to evaluate the idea, and why it doesn’t fit into your plans.

The key is to acknowledge that you appreciate the suggestion while being honest about why it won’t necessarily find its way into your product. Then you can thank them for caring enough to offer their suggestion, and encourage them to keep sharing their thoughts with you in the future.

Stinky Turd
Sometimes customers get angry and frustrated, and they take it out on you. That gift box of customer feedback arrives with
a big Stinky Turd inside of it, as happened in the episode with the unhappy fellow at the beginning of this section.

Getting this kind of feedback is never pleasant. It’s even worse when you know the customer has a legitimate complaint that you want to address, but their behavior is blocking any rational communication.

What to do with it:

It can be tempting to dismiss this kind of feedback but the key to dealing with a Stinky Turd is to separate the useful feedback from the manner in which it was delivered. When a customer crosses the bounds of courtesy and basic decency, it’s easy to convince yourself that the problem is due to their bad attitude.

However, dismissing a Stinky Turd outright means missing an opportunity to improve. After all, most customers won’t yell at you if they’re unhappy - they’ll just leave. So, start by owning the issue, then figuring out if you can do better, and finally, fix it for all of your customers before it becomes a bigger problem. After that, you can have a serious talk with the customer about acceptable behavior and communication.

Adorable Puppy

Most of the time, getting customer feedback is like receiving a puppy from your significant other. It’s wonderful and immediately appreciated, but comes with an expectation of
nurturing for a long time to come. What does this feedback look like? Oftentimes a very happy, fast-growing customer will let you know that they need you to provide new features or a new level of service to support their growth. Adorable Puppies come in all sizes. Sometimes they are just little things that would improve the daily experience for users. This stuff is critical too.

What to do with it:

This is the feedback that can often make or break a product. Accepting the challenge may require more of a commitment than you are ready to make, but rejecting it might spell the end of the relationship—if not now, at some point down the road. If a long-time customer informs you that expectations in the market have shifted, and you need to provide more value to compete, that’s some of the most valuable feedback you can receive. It may even present an entirely new strategic opportunity.

Submit it to a thorough analysis and weigh the costs. Remember: it’s easy to de-prioritize any particular small request but the total weight of these small pieces of feedback add up and can have a huge impact on the how your customers feel about you. So, don’t blow off the little stuff.

Creating a feedback hyper-loop
Part of treating customers as partners is bringing them in on your plans. They want to know where you are headed and if
you’re paying attention to the product improvements that matter most to them. This doesn’t mean we are advocates for publishing detailed roadmaps that look out over many months; that has a way of locking you into plans and preventing you from responding to important product feedback.

However, it’s usually possible to share what is currently in development and which large initiatives you’ve prioritized to be developed next. Sharing your plans can help customers feel like insiders—like they are part of your team. They are not only going to give you the benefit of the doubt, but they’re going to be advocates for your product and your company.

Once you’re shared your plans with customers and collected their feedback, there is one last step to closing the loop: follow up with them when their feedback makes it into the product.

There are bunch of ways you can do this:

• Use release notes or a newsletter to give a shout-out to a customer who suggested a new feature that made it into the release.

• Employ a platform to enable customers to vote on features and track their progress.

• Search through all your support tickets, emails and other customer interactions to directly notify anyone who talked to your team about the issue.

“Transparency and honesty will embolden customers to provide more relevant feedback.”
Once customers can see their suggestions being taken seriously, and experience the product getting better with each release, they will feel encouraged to volunteer more feedback.

Transparency and honesty about your plans and product vision will embolden customers to provide, not just more, but better, relevant feedback.

With time, you can rev up a hyperloop of customer feedback that delivers more Shiny Toys and Adorable Puppies, and fewer Ugly Sweaters and Stinky Turds.
Pillar Four:
Invest in training

We all strive to create products that are so intuitive training is never needed. But let’s be honest, no matter how great we think our products are, there will always be users out there who need our help from time to time.
Good companies go to great lengths to educate their customers and their teams. Investing in training and documentation has been shown to drive user adoption, increase customer spend, and improve customer happiness. That’s why we believe investing in training deserves a place among our five pillars of customer happiness.

**Increased engagement & retention**

Customers who understand your products will use them more extensively and are less likely to churn away, even when alternatives exist. A report\(^1\) published in 2008 by TrainingIndustry and Expertus tells a convincing story about the benefits of customer training. According to their research, when surveyed about the impact of their training programs, an astounding 93% of respondents said they achieved higher levels of customer satisfaction and 88% saw improvements in retention.

Training doesn’t have to be a time consuming affair. Incorporating training into your service experience helps you to not only resolve the customer’s current issue but head off the next one as well—and with marginal expense.

The Customer Contact Council conducted a survey of more than 75,000 people to gain insights into the connection between customer service and loyalty\(^2\). Their findings suggest that incorporating mini tutorials and suggested next-step
Trainings at the end of service calls can reap big rewards. For example, their research tells of Bell Canada reducing its calls per event by 16% and its customer churn by 6% by focusing on forward resolution training techniques.

**Training isn’t only for customers**
Product training for your employees is equally important to the long term success of your customer relationships. For starters, understanding the ins and outs of your products helps them to be better at their jobs. But it also helps them to gain a better understanding of the impact your products have on the lives of your customers.

“Investing in training is a demonstration of a company’s commitment to the future success of its employees and its customers.”

When all of your teams—not just the customer facing ones—fully understand the problems your products solve for your clients, it is easier for them to empathize and engage. Similarly, ensuring every employee is well trained in customer service helps them see how important their roles are to the health of your customer relationships.

Investing in training is a demonstration of a company’s commitment to the future success of its employees and its customers.

But don’t just take our word for it. An IBM Smarter Workforce study looked at best and worst performing companies to see
what part employee training played in their operating performance\(^3\). The results showed 84% of employees in best performing organizations claim to receive all the training they need. That’s a whole lot better than the 16% reported by the worst performing companies in their study.

**Higher revenue & profitability**
Training your employees doesn’t just add value to your customers, it can also help you drive sales–to new and existing customers–which leads to greater revenue growth and profitability. We have experienced this first hand several times.

“In sales to existing customers jumped from 20% to 40% of our gross revenue when we invested in training.”

In one instance, we increased average customer revenue per hour by more than 25% over six months when we made customer training a priority. The icing on the cake was that our Net Promoter Score went from a -30% to a +18% during that period (and nearly doubled again thereafter).

At another company, we watched our sales to existing customers jump from 20% to 40% of our gross revenue when we doubled down on product training.

According to research by Alan Webber of Forrester Research, obtaining new customers can cost up to five times as much as retaining current ones\(^4\). Other sources claim it may be as

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\(^3\) [https://goo.gl/1sZB5s](https://goo.gl/1sZB5s)

\(^4\) [https://goo.gl/Jg1rVp](https://goo.gl/Jg1rVp)
much as 15 times more costly. Whatever statistic you choose to hang your hat on, one thing is certain: the customers you retain are a heck of a lot more profitable than the ones you lose!

What's more, as they become better users of your products, the cost to service them continues to fall. Bain & Company argue that increasing retention by 5% can result in a 25% to 95% increase in customer profitability over time. That's a big deal for businesses of any size.

It would be hard for anyone to argue against investing in a program that can have such a significant impact on business. Want to increase customer loyalty and help your employees be happier while growing your business faster?

Invest in training!

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Pillar Five:
Organize your relationships

In a previous life as a Product Manager, Synap co-founder, Michael Boeke jumped at every opportunity to evangelize his team’s payment product. One of those occasions occurred while he was wandering the trade show at a conference. He spotted a high-profile technology company that he admired
and decided to chat them up. He looked the company up in the Salesforce app on his phone and didn’t see them listed as a customer.

So, feeling confident, he sauntered over to their booth and started talking with their team. It was going great and eventually he saw an opening to ask, “who do you use for payments?” There was a brief pause as they looked at each other, and then told him, “we are customers of yours.” Oops!

They were really nice about it, but it was awkward and Michael felt like an idiot.

“Nobody wants to feel like a moron, but sometimes our tools (and our own disorganization) let us down. However, when we get our customer information organized and in the right place, we can provide a great experience for our customers in every situation and come out looking like heroes. That’s why organizing your relationships is our fifth pillar of customer happiness.

Michael’s embarrassing little encounter is hardly unique. We’ve all experienced and witnessed many types of disorganization in customer relationships. Too many times, when a customer moves through various stages of their relationship with a vendor, they get passed to a new team that has to start from square one. If they are transitioning from

“...
sales to accounts, and sales hasn't tracked all of their customer interactions, the account rep has to chase down the salesperson or go directly to the customer to get oriented.

At best, this is a waste of time for both the sales and account reps. At worst, the customer feels like they are training members of your team on their dollar, damaging the relationship as it’s just getting started. Sadly, this often gets repeated at each phase of the customer lifecycle as they move between teams like support, customer success, and product.

Disorganization can sometimes cause its own problems, too. Having read the first half of this ebook, you know the importance of establishing customer expectations early, but frequently those expectations are exactly what does not get communicated between teams. This is precisely why you need a playbook!

This can lead to confused or angry customers escalating low priority cases to managers (who often end up even more confused and agitated than the customer). Nobody wants this sort of vicious circle, but most of us have stories about crises caused by disorganized intra-company communication.

So, once you’re ready to get organized, how do you get started? There are a couple of dimensions to the problem: getting teammates to record their information and getting all of your information in one spot.
Data entry stinks
Data entry is a pain. You can require people to do it, but you’ll usually get low compliance. In addition to being a lot of work, customer data entry is a chicken or egg problem. Users don’t get value from their customer tracking systems that don’t contain any customer data, but users don’t have much incentive to input their data into a system that isn’t providing value to them.

In response, many companies set up policies to coerce people into entering data into CRM and other customer tracking systems. They tie sales commissions to updating the sales pipeline tracker. Account and customer success reps get graded on data entry as part of their annual review.

Having sales, account management, or customer success teams spend half their waking hours updating customer records is extremely inefficient and expensive. No one knows this better than the smart, talented folks who have to do the data entry, and you can probably guess the effect it has on their happiness.

A much better response is to deploy systems that actually help users with their primary job function. Examples include help desk platforms like Zendesk, Help Scout and Freshdesk that manage request queues and enable support teams to collaborate on issues. For sales tracking tools, look for platforms that focus on making sales reps more productive, instead of just providing reports to sales managers. Good
examples here include Close.io and Pipedrive. Data entry will take care of itself when it’s easier to use the actual tool than communicate outside it. Information will be recorded and tracked in a quick, organic way.

**Parlez-vous Salesforce?**
If you already have teams using and entering data into function-specific software like help desk and CRM tools, you’re still only halfway to organizing your customer relationships. To get a complete picture of the customer relationship over their entire lifecycle, you need to bring all of your customer information together in one place. That means tying together each of those function-specific systems (along with email, phone, and messages, too).

Most of the big CRM platforms want to be the hub for all of your customer information, but they don’t play all that well with other kinds of software. If you’re lucky enough to have a software development team at your disposal, you can certainly get everything wired together through your CRM’s API. You can also hire a consulting firm (aka systems integrator) to tie your different systems together.

Venture capital superstars Andreessen Horowitz famously built a powerful relationship management system that ties together at least six different systems. It’s part of the reason they’ve become a top-tier VC firm in just a few short years, but by co-founder Marc Andreessen’s own assertion, it didn’t come cheaply or easily (and that means something coming from a
VC firm with more than $4 billion in assets under management, co-founded by software engineers).

**A new approach**
Many operations teams have trouble getting internal projects prioritized, or securing budgets to hire consultants. Furthermore, not all roles in a company have function-specific solutions that make their job easier. Often times account reps, product managers, and executives rely on email and internal chat programs to keep up with a portion of their company’s customer communications.

If you don’t have a significant amount of time and money to pull it all together, you’re stuck.

Teams need a better way to gather customer information into one place, and that’s our mission at Synap. Our platform enables everyone to see all of their customer communications in one place. Best of all, integrations don’t require consultants.
and engineers — business users are able to configure integrations from their web browser. It's the kind of tool that helps you get organized and feel like a hero.
The final word

Drawing closer to our customers is not just a matter of installing a CRM software and improving the way we gather feedback and measure customer satisfaction levels. As you may have noticed, we didn’t address customer satisfaction metrics, NPS scores, and other frameworks extensively in this eBook. That was intentional.

Having access to the right tools and technologies to track and measure stuff is important, but it is not enough. Creating real value for customers and building lasting partnerships with them begins with qualitative effort. Tireless work to build powerful relationships can be augmented and supported by quantitative measures.

A 2005 article in Harvard Business Review by Ranjay Galati and James Oldroyd argues this point eloquently⁶.

“Getting close to customers is a journey the whole organization needs to make... It takes years, but there are rewards along the way and for those organizations that have gone the distance, the payoff is remarkable.”

We couldn’t agree more.

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⁶ https://goo.gl/9fQ2dy
Thank You

Thanks for taking the time to read our guide. We hope you learned something new about creating happy customers, and building relationships that last.

If you found this guide useful, please help us spread the word by sharing it with your network.