

## 3 Ways to Enhance Customer and Employee Collaboration Post-COVID-19

*Now is the time to harness all the tools of customer engagement*

IT IS NO LONGER business as usual, as companies around the world are having to learn to adjust to the new normal resulting from the COVID-19 pandemic. Customer knowledge and enhanced customer collaboration are at the core of this new normal. Here are the top three ways companies are adjusting:



### LEVERAGING HOLISTIC CUSTOMER PROFILES WITHIN CRM TO DRIVE CUSTOMER OUTREACH

At the core of every successful CRM implementation is the creation of holistic customer profiles that provide needed information to support the key sales, marketing, and customer service processes. Think of it this way: The customer profile is a flower, and then you place the customer at the center of the flower and add the appropriate “petals” of information about the customer, including front-office data (e.g., CRM), back-office data (e.g., enterprise resource planning), digital insights, and third-party data.

Next, you analyze your customer profiles to identify unique customer segments. For each identified segment, you leverage technology to create both digital and non-digital customer journey maps to identify the best way—this includes next-best-action recommendations—to move customers down the sales pipeline. You are then ready to determine the optimal products and/or services to offer these customers, as well as identify the most appropriate channels for engaging them. Finally, you are ready to create optimal customer messaging that strongly resonates with each segment. Once these steps are completed, you open profiles to customers so that they can self-service them.

The goals for leveraging holistic customer profiles are simple: to help improve your customer knowledge and enhance customer collaboration to achieve long-term customer loyalty and advocacy. The world’s most well-run companies have been implementing this best practice for years because it is a no-brainer: This approach delivers outstanding customer engagement results. So how could it be that fewer than 50 percent of global companies have built comprehensive customer profiles?

### IMPLEMENTING DIGITAL COMMUNITIES TO ENHANCE CUSTOMER AND INTERNAL COLLABORATION

While cooped up at home during COVID-19, most of us have come to appreciate the utility of participating in online meetings. Many of us went a step further and joined or became involved with company-run intranet communities and/or external digital communities. With intranet communities, we like how easy it is to get accurate information, all stored in one location. And we enjoy resolving challenging customer issues by collaborating with colleagues in a secure environment.

In external digital communities, customers have learned to appreciate “ask the expert” features in which they can question and quickly receive answers from company subject matter experts and/or other customers in the community. Customers relish peer-to-peer exchanges with colleagues and customers, as well as the ability to

THE GOALS FOR LEVERAGING HOLISTIC CUSTOMER PROFILES ARE SIMPLE: TO HELP IMPROVE YOUR CUSTOMER KNOWLEDGE AND ENHANCE CUSTOMER COLLABORATION.

receive multiple perspectives on an issue. They enjoy sharing their stories and videos and learning from others, all activities that positively impact the company's image in the eyes of customers.

The sales and customer service impact resulting from these digital communities is also impressive. We've measured this impact for all of our customers and found that between 30 percent and 40 percent of customers belonging to a company's branded community purchase more products from the company than customers not belonging to the community. Between 50 percent and 70 percent of distributors belonging to these communities sell more products than distributors not belonging to the community. It's no surprise that well-run digital communities have a very short payback period.

The sales benefit is not restricted to increased sales. By employing digital triggers and digital journey mapping, companies can invite prospects to their community, encourage them to navigate inside the community based on best customer practices (for example, securing customer feedback at key points in the decision-making process), and ultimately shorten the sales pipeline. For many companies, digital communities have become the most cost-effective way to nurture leads and close deals.

Digital communities are a cost-efficient way to enhance customer and employee collaboration by creating a two-way dialogue with colleagues, company experts, and customers. Digital communities also provide an excellent way to gain customer insight based on the voice of the customer and to secure valuable feedback in real time regarding changing customer preferences. No wonder use of company-run intranet communities and external digital communities has soared.

## LINKING DIGITAL COMMUNITIES WITH CRM TO ACHIEVE OUTSTANDING CUSTOMER ENGAGEMENT

Here comes the most exciting part of how to enhance customer and employee collaboration post-COVID-19.

As your employees, customers, and prospects participate in these communities, you employ well-established community moderation services to capture sales

opportunities and service issues that come up during these online discussions. You can then input these opportunities and issues directly into the appropriate customer profile contained within your CRM system.

Within minutes, the CRM system automatically triggers an alert to your sales reps of each new sales opportunity and captures the context of the opportunity based on the digital dialogue. A sales rep jumps on the new opportunity. Alternatively, the CRM system automatically sends an alert to customer service agents of a service issue requiring action. An agent springs into action and proactively reaches out to the customer to resolve the issue.

By tightly linking digital communities with CRM, companies leverage both their digital communities and CRM investments to achieve outstanding customer engagement.

As a result of COVID-19, companies will see dramatic changes in customer behavior (e.g., customers could become more skittish or in need of assistance). To successfully address these changes, nothing will be more important than engaging effectively with colleagues and customers. Whether you achieve this by leveraging holistic customer profiles within CRM to drive customer outreach, deploying digital communities to enhance customer and internal collaboration, or linking digital communities with CRM to achieve outstanding customer engagement, now more than ever is the time for you to take action. 

EMPLOY WELL-ESTABLISHED  
COMMUNITY MODERATION  
SERVICES TO CAPTURE  
SALES OPPORTUNITIES  
AND SERVICE ISSUES  
THAT COME UP DURING  
ONLINE DISCUSSIONS.

*Barton Goldenberg (bgoldenberg@ismguide.com) is president of ISM (www.ismguide.com). Since 1985, ISM has established itself as a premier strategic adviser to organizations planning or implementing customer strategies to address digital transformation, data analytics, CRM, social media communities, customer engagement, and emerging technology initiatives. He is in high demand as a keynote speaker (www.bartongoldenberg.com) and is the author of four books, including his latest, The Definitive Guide to Social CRM. He is currently completing his new book, titled Engaged Customer Strategy: Your Roadmap to Success in 2030.*