



 InMoment

CX FOR EVERY STAGE

Customer Experience

From Startup To Enterprise

How to Start and Scale A Voice of Customer Program in Tech

INTRODUCTION

As Your Business Grows Start and Scale a Customer Experience Program with It

Every one of your customers is taking a journey, a unique path of individual steps that form the customer experience. The goal of any company is to create the smoothest journey possible—one that leads to more conversions and more success for you, as well as more value for your customers.

Customer Experience (CX) programs built to improve this journey have become a critical component of business success (no matter the industry). Fundamental to these programs is Voice of Customer (VoC) data—your customer's feedback about their experiences with and expectations for your products or services. Carefully monitoring your customer's satisfaction will help you increase retention, drive growth, and address your customers' needs in a focused and impactful way.

A good CX program uses a continuous improvement framework that begins with program **design**. From there you **listen** to your customers, **understand** the feedback you receive, and take action to **transform** your customers' experiences. You should expect and identify financial outcomes from CX efforts, such as an increase in customer lifetime value. And last but not least, at each stage of growth you should be able to quantify the bottom line impact that you **realize**.



The information in this guide will help you grow your CX program with your business and become an expert when it comes to developing an experience program, no matter whether you're just starting out or are a large enterprise looking to get the most from your data. CX experts today are using innovative technology like Natural Language Processing (NLP) to get insights from customer feedback in real time.

Chances are good that you're looking for customer feedback software to support your listening efforts or just looking to get expert advice on next steps. By envisioning elements of a mature CX strategy, you will be able to confidently choose the software or evolve your current program that meets your needs now—and that can grow as **your business needs change**.



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Get Started on the Right Foot

Early Stage: First CX Program

Design	Listen	Understand	Transform	Realize
<ul style="list-style-type: none">Form a tiger team.Match CX goals (retention, growth etc) to business goals.	<ul style="list-style-type: none">Choose a CX metric and a survey process.	<ul style="list-style-type: none">Read, segment and tag qualitative data.Identify and prioritize themes.	<ul style="list-style-type: none">Close the loop with every customer.Evangelize CX data.	<ul style="list-style-type: none">Document anecdotes of CX program impact.

Designing a CX program and getting started with customer surveys for the first time is a key moment for a business. Your employees may not be familiar with your new feedback and metrics and how your organization can leverage them to make more informed business decisions.

Perhaps your users will be seeing a survey from you for the first time. It's important to be thoughtful with each decision and how to communicate the business benefits and roles your employees will take when implementing a CX program.

DESIGN

Build a CX-First Culture

Building a CX-first culture will help you create successful, happy customers. The most important point at this stage is knowing that customer experience programs function best when the entire company is involved.

At a small company or early-stage startup, the CX champion is often someone in product, marketing, or customer success. This person is your customer experience evangelist. It is important that this individual has a strong supporter in the C-Suite to make sure CX metrics get company-wide visibility, and to support the growth of a customer-centric culture at every level.

Your champion can form a “tiger team” of CX enthusiasts from across every department. They can coordinate responses across the business and make sure that you’re meeting the needs of your customers.



Your CX champion is often tasked with finding customer experience software and it’s important to assess your options. Choose a technology partner that makes it easy to kick off your program—and has the advanced features and consultation you’ll need as you grow.

LISTEN

Choose a Metric & Survey Process

Early Stage: First CX Program

Start by defining the goal of your CX program. Maybe your priority is to optimize your software or to improve the support experience. Knowing what you want to learn will inform your listening strategy.

Begin With Microsurveys and a Valuable Metric

Gone are the days of long, multi-question surveys. Completion rates are dismal. Today, many companies pick a single question that will “metricize” customer loyalty or satisfaction, and then invite the customer to explain their score in their own words. These microsurveys garner high response rates that allow you to hear more from your customer base.

There are a number of valuable metrics in the CX toolbox. Net Promoter Score (NPS®), Customer Effort Score (CES) and Customer Satisfaction Score (CSAT) are three of the most popular

and powerful survey metrics used to learn about the customer experience. We recommend you begin with NPS for your first customer survey. Net Promoter Score is the gold standard for measuring customer loyalty and will give you immediate insight into your customers’ stories, but you’ll likely need other survey types and metrics down the road (which we’ll elaborate on next).

Choose Your First Survey Channel

Common survey options include email surveys, in-app surveys inside a web or mobile product, and SMS. Each segment of your customer base probably has a preferred method of communication.

Think about where your most important customers are interacting with you. If you’re running a SaaS business, it’s probably best to

consider an in-product survey.

On the other hand, if you have an ecommerce business, you might opt for a transactional approach such as sending an email survey a few days after delivery. Asking the NPS question via SMS is the way to go if you are an airline, utility or other business that communicates with customers on their mobile devices.



UNDERSTAND

Learn From the Customer

Early Stage: First CX Program

Read Every Comment

When you're getting started, nothing can replace reading (and responding) to every survey response you collect. You'll stay closer to the customer and develop a holistic view of their experiences.

Segment Your CX Data

Even if your company provides only one service or product, your customers are not all the same. Categories of users have different needs and are bound to experience your company in slightly different ways.

Segmentation lets you see the NPS for particular user groups and determine how you're faring quantitatively. You're able to figure out whether NPS is being driven up by one segment or down by another. You then have the opportunity to make your product or service better for people in those precise segments that lag behind the curve. It's a powerful tool for prioritizing your efforts.

Identify and Prioritize Themes in Customer Comments

When you get more qualitative feedback than you can easily digest, you can filter your text responses for specific topics with tags. Tags are associated with keywords that you want to monitor, and they allow you to easily track the Share of Voice (SoV) in a topic. How much are people talking about price, performance, delivery, or a new feature?

Categorization will help you follow long-term trends, give you insight into a topic's trajectory, and let you know whether you're addressing your customers' concerns effectively or still need to do more.

At this point in your program, you may know intuitively which tags would work best. Set up text-match tags in your feedback program and you'll quickly be able to rank the importance of different topics by how much customers choose to talk about them over time.

TRANSFORM

Close the Loop with Every Customer

Early Stage: First CX Program



You should close the loop, especially with detractors! Reach out via email or phone and address their concerns promptly. Passing your CX data to the system you use to communicate with customers — like Intercom or Hubspot — can make this easy. Customers will appreciate that you took the time to listen and respond. You may even turn a detractor into a happy customer.

Activate your brand promoters. When someone gives you praise in a survey response, ask them to write a review or give you a quote. These testimonials can be great ways to distinguish your brand from the competition.

If you don't have the resources to respond individually, write a blog post that summarizes what you've heard

and actions you're taking and share it with your customers.

Intercom can be a powerful tool to close the loop and maintain a proactive customer success program!

[Learn More.](#)

TRANSFORM

Evangelize CX Data

Early Stage: First CX Program

Now is the time to set up that Slack channel with the rest of the team or forward a weekly NPS report. Seeing feedback in real time naturally helps everyone maintain empathy with your customers. You can share in the joy of the compliments you receive and tackle the issues that detractors raise. Take into account the unique ways every department can support the customer and benefit from CX data.

- **The Customer Success and Support Teams** are passionate about shepherding SaaS customers through onboarding, as well as ensuring that customers see value. Customer Support is your first responder, too. They'll ensure you capture the benefits of customer surveys by addressing customer

needs as they arise. This team should be able to call for help from anyone in the company if it needs to.

- **The Product Team** has a new source of data for planning and product optimization. The team can explore feedback to focus engineering efforts where they can improve the customer journey. The product team should be ready and able to contact customers and get more detailed information.
- **The Marketing Team** has a new way to learn how your product benefits the customer. The team also has a great source of testimonials and case studies for product messaging. Taking the time to read VoC comments can drive powerful new campaigns that would never have been considered prior!

- **The Sales Team** can watch feedback to learn customer' states of mind before the next renewal call, learn which features are resonating, and see which customers are ready for upsell

It's important to make sure everyone has easy access to CX information!

Create a CX Slack channel and encourage the entire company to join. Put up a wall-mounted dashboard of customer comments and metrics that put them front and center with the newest feedback and the latest scores. Report it right next to other critical business metrics at the next company-wide meeting.

REALIZE

Document CX Program Impact

Early Stage: First CX Program

It is important to document and share the impact of your program-- even early on. Building this muscle will help you take your program to the next level. In the early stage, a customer experience program can pay for itself overnight and/or has the ability to contribute to successes and engagement within your organization.

EXAMPLES OF HOW TO QUANTIFY THE IMPACT OF YOUR PROGRAM:

- When a customer success manager [saves a key account](#) because she acted upon customer feedback.
- You can note the two product improvements that are now on the roadmap because they surfaced in feedback.
- If marketing is currently activating promoters to write reviews, document how many reviews these customers have written.
- Maybe an engineer got a much needed boost from seeing positive customer feedback in Slack about a feature that was created based on feedback.

Can you assign a dollar value to this impact? Maybe not yet, but take the time to document and share these facts and anecdotes throughout your organization. They confirm you are on the right track and ready to put more levers in place to quantify your CX program.



Next Step to Improving Customer Experience

Growth Stage: Taking CX to the Next Level

Taking your CX program to the next level means taking a more holistic view of the full customer journey. It means leveraging technology so you can still listen when comments number in the hundreds or thousands. It means more robust analytics.

You can begin combining surveys with other behaviors, then get concrete numbers on how your customers are reacting to different aspects or changes in your offering(s). This

method can show you how CX impacts important metrics like product use, retention, and sales.

Once you've learned how your customer moves from their first touch to engagement, you can begin making data-driven decisions and acting in fast, targeted ways.

You'll also learn to use automation to interact with customers faster and to effectively support more of them.

“We have dedicated resources to CX at this stage because we are positioning ourselves for growth. There are other platforms out there—we know that with superior customer experience we will maintain a competitive edge.”

DIRECTOR OF CUSTOMER ADVOCACY

Design	Listen	Understand	Transform	Realize
<ul style="list-style-type: none"> Reassess CX program goals. 	<ul style="list-style-type: none"> Gather feedback along the customer journey. 	<ul style="list-style-type: none"> Use machine learning to categorize and analyze feedback. Combine CX and behavioral data. 	<ul style="list-style-type: none"> Close the loop at scale. Get data in everyone's workflow. 	<ul style="list-style-type: none"> Link CX data to business outcomes.

LISTEN

Gather Feedback Along the Customer Journey

By now you may have mapped your customer journey and identified critical touchpoints that drive success. These include achieving first value, supporting interactions, and using a new product or service.

Asking the right question at different steps along the path to success will help you build a better customer experience. Here are two additional metrics that can help here!

New Ways to Find Hidden Customer Intelligence

By bringing CSAT/PSAT, CES, and NPS into your CX equation, you'll have new ways to understand previously hidden parts of the customer journey and ensure every interaction is one that the customer loves!

NPS, CSAT and CES work together as the foundation of a modern CX program. [Learn More](#)



CUSTOMER SATISFACTION SCORE

Customer Satisfaction Score (CSAT) is the most popular CX metric for transactional interactions. A CSAT survey asks a customer how satisfied they were with a recent interaction, such as a support call. Use it to gauge how well these critical interactions are being handled.

In ecommerce, this survey is often used to gather post-delivery feedback. SaaS product teams often use a variant of CSAT called a Product Satisfaction survey (PSAT). It is often triggered in-app to solicit feedback that helps the product team optimize user experience.



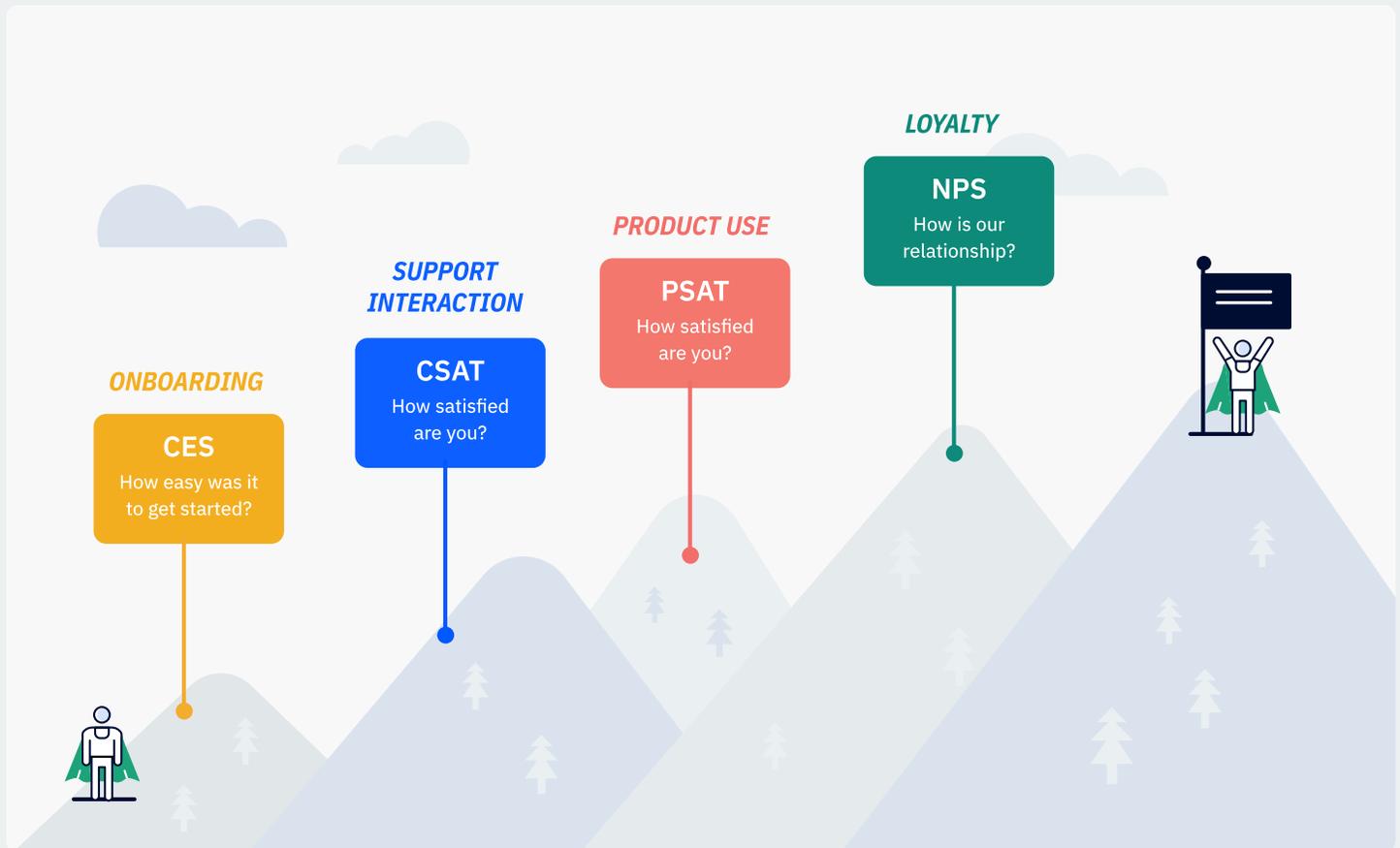
CUSTOMER EFFORT SCORE

Customer Effort Score (CES) surveys ask the customer “How easy was it to ___”?

CES is a CX metric used to improve systems that may frustrate customers. It is a popular metric for gauging satisfaction with support teams. Customer Effort Score can also tackle a critical first step in the customer journey: **onboarding**.

Onboarding—the first experiences of a new customer—is a critical point in the customer journey. A small hiccup can have a big impact, and losing a customer because of a challenging early experience can be a painful, obtuse problem. Customer Effort Score allows you to capture early feedback and discover ways to ensure that the path to first value is smooth.

A view of the SaaS customer journey: Integrating CX survey data in your CRM of record.



CX is the cumulative impact of every touch point throughout the customer journey. [Learn more](#)

UNDERSTAND

Customer Insight Through Machine Learning

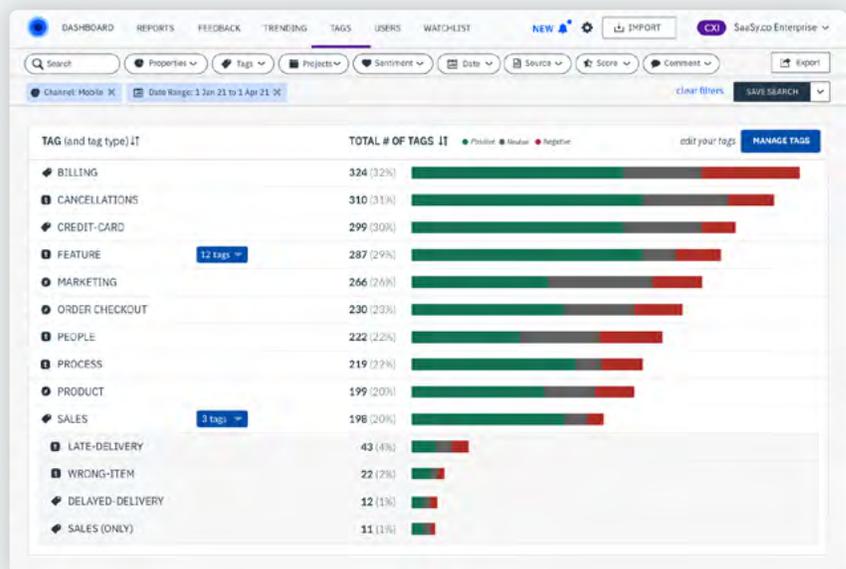
Growth Stage: Taking CX to the Next Level

In a survey from Harvard Business Review Analytic Services, only 23 percent of business leaders report they're able to act on all or most of their customer success data. When collecting thousands of surveys, large amounts of data become hard to address at scale, and text-match tags won't truly capture the wealth of information available.

To get to the next level, you'll need more advanced tools to extract the insights hidden in your data, such as Natural Language Processing (NLP), a form of artificial intelligence for real-time categorization and sentiment analysis.

Rule of Thumb: If you are collecting more than 500 responses a month, natural language processing will be a powerful force to uncover customer insight.

Automatically categorize feedback in real time to help you surface issues, prioritize product improvements, or route for follow up.



“For many businesses, the wealth of customer experience data has become overwhelming. Artificial intelligence gives you the means to retake the initiative.”

INMOMENT

Analyzing Customer Feedback Using Natural Language Processing



Customer Feedback



Multilanguage Feedback

Overall Neutral Sentiment

I feel it works well, but it's a little expensive for our usage level. Other than that the dashboard is intuitive, easy to get started and very handy for troubleshooting issues.

dhvani.p@example.com
10 Jun 2021 / 4:22 PM
NPS 7

UI/UX x SETUP x PRICE x +

Overall Negative Sentiment

Necesitan mejorar su soporte al cliente, el empleado con el que hablé fue una pérdida de tiempo.

They need to improve their customer support, the employee I spoke with was a waste of time.

jessica@example.com
24 Jan 2021 / 12:46 PM
NPS 3

CUSTOMER-SERVICE x +

Categorization in Real Time

Natural Language Processing is a collection of tools and methods that allow computers to interpret and analyze text data, and can help you recapture the initiative in your VoC program. Using NLP, CX data is auto-tagged as new topics arise. This brings issues front and center immediately, ensuring nothing gets missed and no customers get left behind.

Sentiment Analysis: Why Your Customers Love You (or Don't)

Unlike traditional text match tagging, NLP can perform sentiment analysis. Not only is every topic tracked over time, but the tone and tenor of the customer voice is tracked as well. This lets you know whether your customers feel positive or negative when they talk about a specific part of an experience! You can also learn how your business initiatives are impacting your customers in real time. This is a powerful step in VoC that leverages the most advanced technologies.

TRANSFORM

Data Access and Customer Experience

Growth Stage: Taking CX to the Next Level

Get CX Data Into Everyone's Workflow

Stakeholders shouldn't have to search for VoC data. Sales needs to see CX metrics at the account level in Salesforce to prepare for an upsell conversation. Success may use Gainsight or other platforms for regular communications with customers, while Support is in Intercom or ZenDesk. Product may want the data in their analytics platform like Tableau. Analysts will want to be able to pull CX data into their relational database. All functions are able to drive better customer experiences and benefit from having CX data and analytics at their fingertips.

Connecting your CX program to other applications and software will bust silos and let you create powerful interactions to promote your business and delight your customers. Look for CX software platforms that have the native integrations and also open APIs that you need to make this seamless.

InMoment easily integrates with any database, CRM or analytics system, allowing you to connect your user data directly to customer success and perform advanced analytics. [Learn More.](#)

Optimize Your Product with CX

When you collect CX data, you can see your customer's concerns in a clear light. Now you can perform the next step: product optimization! Customer Experience often reveals areas of the product that can be improved, and using CX data you can rank and address the things that matter most. We recommend creating a dual-axis plan of attack. Look at the number of impacted customers and their average score for each issue, and combine it with a qualitative measure of engineering and operational effort required. This will help you maximize customer impact!



TRANSFORM

Close the Loop at Scale

Growth Stage: Taking CX to the Next Level

Taking action at the next level means going beyond personal callbacks.

You no longer have the bandwidth to respond to every customer. Here are three approaches that represent different levels of engagement. Note that it's OK to take a hybrid approach, and most companies do. Think through what is right for your business — the most important thing is that everyone's feedback is acknowledged.

1. High Touch: A customer success agent or account manager can reach out to their customers when they respond, even if just to say “Thanks!” This lets customers know you're listening and appreciate their feedback. For a

B2B business, this is the way to go if you have the resources.

2. MediumTouch: If you don't have the resources to personally contact everyone, segment the list by survey scores. Sync with a platform like Intercom to trigger automated messages, or schedule a weekly email campaign to each group.

- Thank your promoters and possibly offer an incentive for them to take action as a brand advocate. For example, share their support on social media.
- Route responses from detractors to success or support. Devote time into finding out more about why they aren't happy,

especially those that didn't leave any feedback.

- Consider an automated message to passives that didn't leave feedback. The goal here is to engage in a “What would make you LOVE us?” conversation.

3. Low Touch: Respond with information-sharing and transparency. Consider writing a blog post or newsletter at the end of the month, summarizing the feedback you've received and stating your plans to address issues customers have raised. This lets your customers know that you're listening and that you have a plan to make their experiences better.

REALIZE

Link Your CX Metrics to Business Outcomes

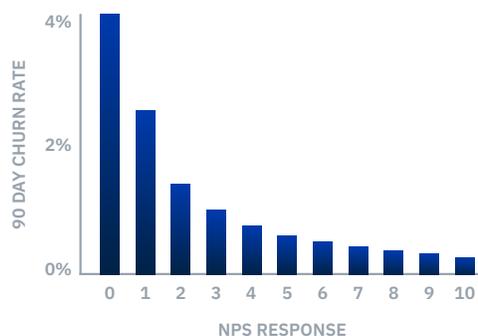
Growth Stage: Taking CX to the Next Level



As you gather more data, you can tie your customer experience directly to business outcomes by linking customer survey data to business metrics like purchases, conversions, churn, or sales.

Take a mobile app as an example; one awesome approach here is to connect your CX data to your post-survey, 90-day churn, and see at which scores you begin to rapidly lose customers. Using NPS, you may find that you can tolerate some Passives (and perhaps even some 5 and 6 Detractors), but your 0s and 1s may be at serious risk of leaving soon if they don't receive support!

We often see a chart that looks like the one to the right. The numbers are hypothetical, but the distribution is a common pattern.



If you are a B2B business, you can factor NPS and other CX metrics into a Customer Health Score that also takes behavioral metrics like the number of support tickets per user, usage of product features or other engagement metrics into account. You can also track success milestones to monitor and anticipate risk of churn.

Become an Experience Improvement Expert

Expert Stage: CX as a Competitive Advantage

By now you fully understand your customer journey and you're using advanced tools like NLP to automatically identify issues as they arise. It's time to take your CX to the expert level! This means experimentation, using new channels to get the customer voice to the right person in large organizations, understanding the math behind segmentation and pulling CX data into new types of models. It also means moving to help the customer preemptively. To be a true CX expert, you'll need to understand the drivers

of the CX experience and predict when customers might be struggling before they tell you!

These CX tools are often employed by mature enterprises to maximize their CX program, but will benefit everyone looking to be a CX expert. When you collect thousands of responses a month or are operating at enterprise scale you'll run into new challenges and new opportunities. Here are some best practices to make sure you continue getting the most from your CX program.

“Leading brands in CX start with a strong foundation in customer satisfaction. Understanding how to build upon it is what sets the best brands apart from the rest.”

AUGIE RAY RESEARCH DIRECTOR,
GARTNER

Design	Listen	Understand	Transform	Realize
<ul style="list-style-type: none"> Reassess CX program goals. 	<ul style="list-style-type: none"> Test new questions. Target specific customer segments. Monitor all feedback channels. 	<ul style="list-style-type: none"> Use a VoC Command Center. 	<ul style="list-style-type: none"> Take preemptive action. Democratize insights. 	<ul style="list-style-type: none"> Quantify increase in customer lifetime value, cost savings.

LISTEN**Consider New Questions**

Once you're collecting more than a few thousand responses per month, you have enough data to not only segment your customers, but begin to try asking new questions as well! This can be a powerful tool to gather data on specific customer needs, new product features or potential pain points along the customer journey. For instance, instead of following up with a simple "Please explain your score", you might consider questions such as "What product feature would you like to see improved or added"? This type of data can be a powerful way to get to the heart of pressing business concerns.

Customizing Feedback Collection by Customer Group

Sometimes your most essential users may not be your largest group of users. A SaaS platform may have scores of read-only users for every admin on the account. Mobile apps will naturally get more feedback from



iOS users than Android. To balance the feedback, define survey sampling parameters for these two segments differently. Sending surveys in Portuguese to customers in Brazil is another example of customizing your program by user group.

Monitor More Channels of Customer Feedback

CX pros know that today's hyper-connected customers are providing feedback whenever and wherever it is convenient for them. What are customers saying about you on social

channels like Twitter or review sites like the App Store, Yelp, or G2Crowd? These channels are an additional source of CX data.

“It’s so much easier when you can have all of the feedback come into one place. You can look at the snapshot view.”

**STERLING ANDERSON,
HOOTSUITE**

UNDERSTAND

Use a CX Command Center

Expert Stage: CX as a Competitive Advantage

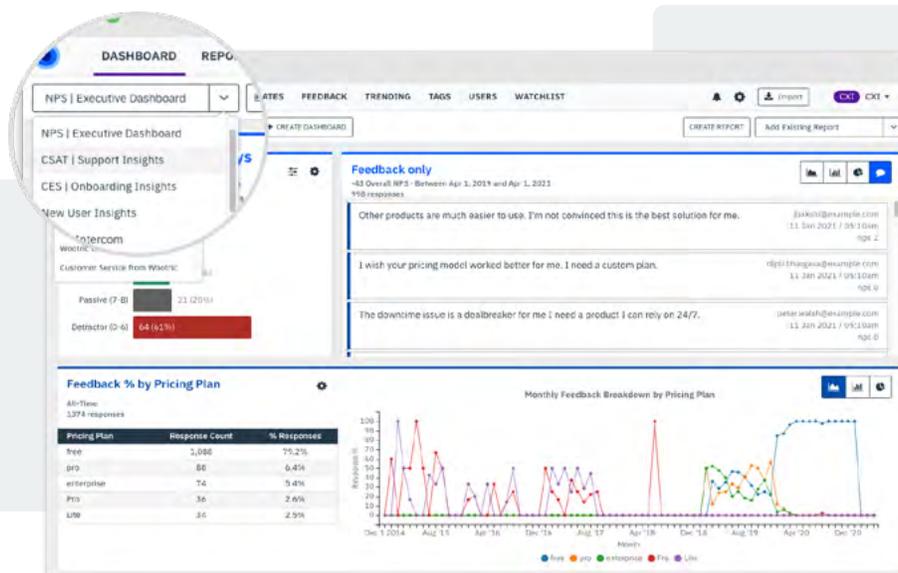
Companies are inundated with Voice of Customer feedback that goes beyond survey responses — from support tickets to social channels to user interviews. And it's all over the place, siloed with different teams. Expert CX teams take a systematic approach to aggregating and analyzing feedback to provide a unified VoC perspective that can guide improvements to customer experience. A CX software platform that receives and analyzes all of your VoC data in one place, regardless of data source, can provide a single

source of truth that you need. Use it to slice and dice the data for deep cause analysis. It can also alert you to new trends and anomalies.

TRANSFORM
Preemptive Action

To be a true CX expert you have to move beyond reactive responses to preemptive actions by helping your users before they know they need it. A company with an expert CX program will use the tools outlined above to anticipate the customers who might have a challenge. For

instance, through segmentation and modeling you might discover that a particular feature or event is associated with first-time users churning, and act to change your product to preempt that pain point. Perhaps you accomplish this by having Customer Success reach out to new users as they approach a stage, for example, triggering a reach-out to help customers when they reach that point or having support contact users through a chat window.





Democratize Insights

If you're gathering new data about specific features or journey points in a large organization with hundreds of individuals interested in VoC, it's important to get data to the right people, fast. Self-serve capabilities are critical so that everyone is empowered to access data themselves. Make it easy for them to slice and dice the data themselves so they can get to the root cause of issues they are seeing. Customized dashboards that enable each team to focus on the data that matters to them will save time. For example, a product manager might create separate dashboards for teams devoted to iOS and Android versions of an application. You may also want to build a more mature routing system so that people get the data they need automatically. One of the best ways of tackling this is a weekly digest that uses tags to email the right people. At large enterprises, we've seen email

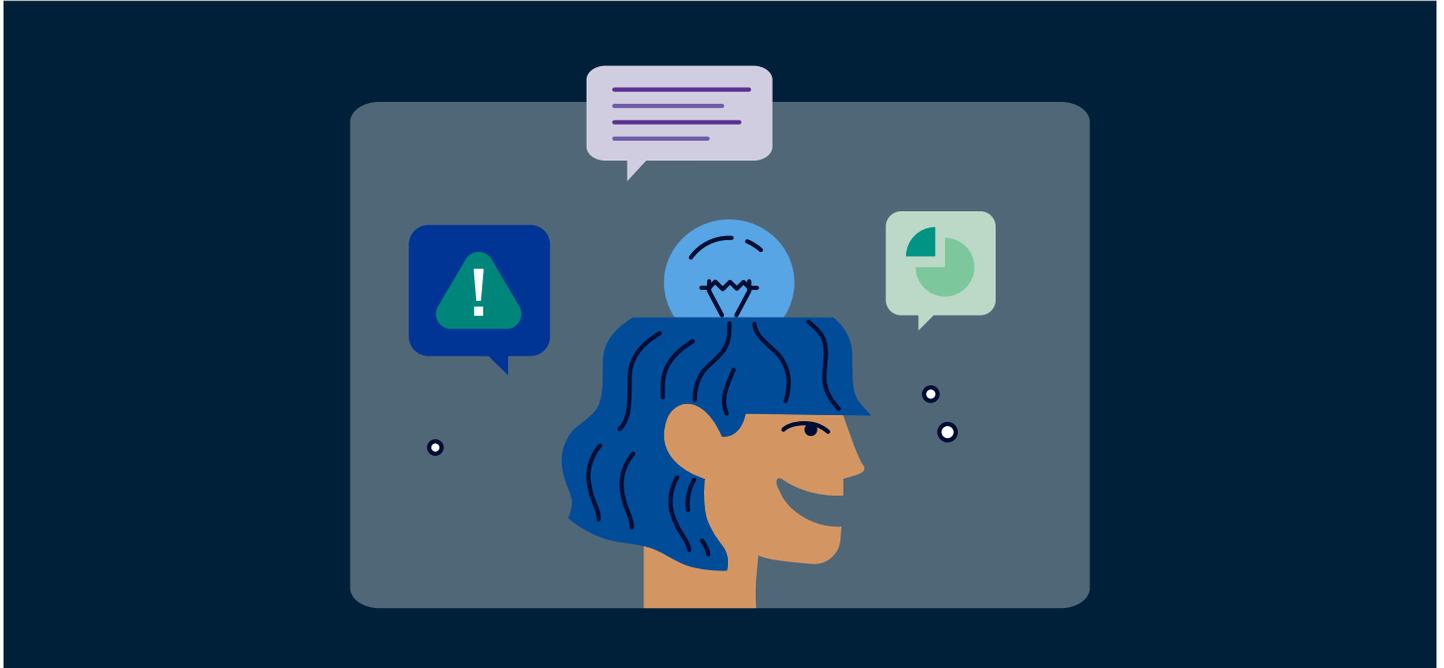
digests going out to hundreds of individuals, and they quickly become indispensable to the organization!

REALIZE

Quantify CX Impact

By now, your CX efforts should be designed around economic pillars so you can drive a clear increase in customer lifetime value. Which in turn, should be helping you quantify your return on CX investment in hard numbers—speaking the business language of the C-Suite.

Four pillars that you should continually evolve your strategy around are: retaining customers, acquiring new ones, looking for opportunities to cross sell and up-sell, and/or focusing on cost saving. The fourth pillar, cost savings, is often an overlooked benefit of a CX program. For example, you can quantify the use of text analytics (saving time) and making the team more productive.



CONCLUSION

How to Choose the Right CX Partner

It's important to continue to grow your CX program with your company and make sure you're taking the right steps to get to the next level. While feedback collection and analytics become more complex, acting on the rich feedback and valuable intelligence will give you happier customers and more growth. Modern technologies are helping companies make faster, more accurate decisions than ever before, and staying up-to-date will help you become and remain a market leader.

If you'd like to learn more about how InMoment can help you build a customer experience program that will succeed at any scale, contact us!

[Request a Demo](#)

About InMoment

InMoment™ helps organisations deliver more valuable and inspiring experiences to their customers and employees at every moment in their journey. Our clients gain the wisdom of our experts—who bring deep domain knowledge in experience design and delivery—coupled with our award-winning Experience Intelligence (XI)™ platform that continually analyses and evaluates enterprise experience data and customer feedback. Recognised as a leader and innovator in our sector, we collaborate with the world's leading brands to attract, engage and retain their customers. We are fiercely proud that our clients continually tell us they love the experience of working with our company, as we constantly stretch to exceed their expectations. Take a moment, and learn more at inmoment.com or email us at sales@inmoment.com

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