Voice-of-the-Customer Optimization

We're excited to have you join us today!

Prism Global Marketing Solutions is an inbound marketing agency and

HubSpot Platinum Partner based in Arizona.

prismglobalmarketing.com

Hi, I'm Kevin Dunn.

Manager, HubSpot Academy Education

Follow and engage with the team:

🐦 @kevin_dunn

in /in/hubspotkevin

🌐 www.agencyunfiltered.com

Fun Fact: On my honeymoon in Costa Rica, my wife and I volunteered at the local dog shelter.

Agenda

1. What is HubSpot Academy?

2. Why is Voice-of-the-Customer optimization important?

3. How can I source more customer feedback?

4. How can I more strategically analyze customer feedback?

5. What does this looks like in HubSpot?

6. Questions

Our purpose is to educate and inspire people so that we, together, transform the way the world does business.

Execute with excellence.

Education with passion.

Create equitable learning experiences.

Foster meaningful collaboration.

Put the user first.

Never settle.

Always be learning.

Authenticity.

>> academy.hubspot.com/guiding-principles <<

Our Mission

HubSpot Academy will be the destination people go to learn how to start and grow a business.

# We offer a variety of educational and inspirational content in service of our mission.

6 Ways to Increase Your Customer Feedback Survey Response Rate

USER BLOG | 3 MIN READ

Track

Setting Up Your Service Hub Account

1h 28m remaining

Learn the essentials for building an inbound customer service experience with Service Hub. You'll learn how to create and manage a help desk, set up self-service options, improve your reps' efficiency, and treat every customer like a person—not a...

Service

Resume track

Inbound Marketing Certification

Learn inbound marketing techniques that range from creating content and social promotion to converting and nurturing leads.

Learn More

All 100% free

Agenda

Domino's Pizza ($DPZ)
AN ORAL TIMELINE

1960

Tom and James Monaghan purchase a small pizza shop called **DomiNick's**

Tom Monaghan retires and sells 93% of the company to investment firm Bain Capital for **$1B**

1998

2009

Shares bottom out to $3 and Domino's is seen as the **worst tasting** national chain in US

Had a few slices of Domino's Pizza haven't had it in a few years. It was alright but the crust seemed a bit lacking.

2:14 PM Sep 24th from web

Tonyx35

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Patrick Doyle installed as CEO; embraces **customer experience** as core strategy

2010

Doyle's Action Plan

01

Put a spotlight on feedback

Launched a brutally honest ad campaign focused on harsh customer criticism about the quality of their pizza

02

Empowered the whole team

Trained all staff to have autonomy, so anybody can take matters into their own hands to solve for the customer

0

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Domino's Pizza ($DPZ)

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2019

Domino's overtakes Pizza Hut with **14,000 global locations**; stock price soars to $300+

Domino's change in stock price compared to FAANG stocks

During CEO Patrick Doyle's tenure

Domino's change in stock price compared to its competitors

During CEO Patrick Doyle's tenure
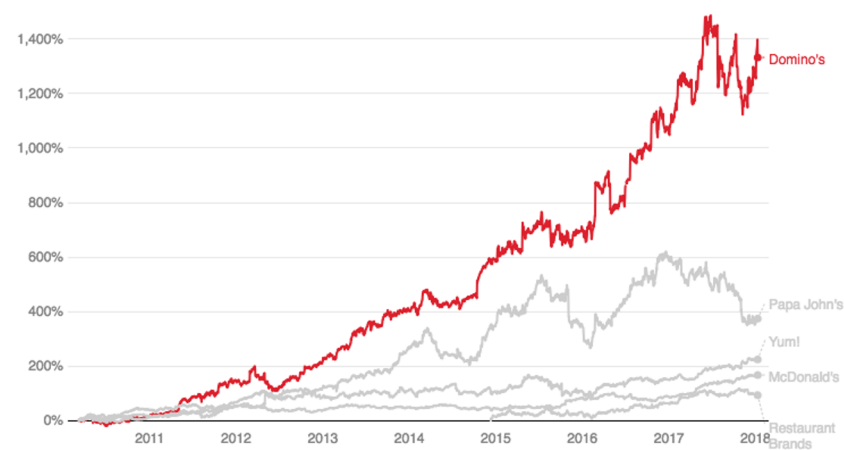
You can either use negative comments to get you down or you can use them **to excite you and energize your process** to make a better pizza.
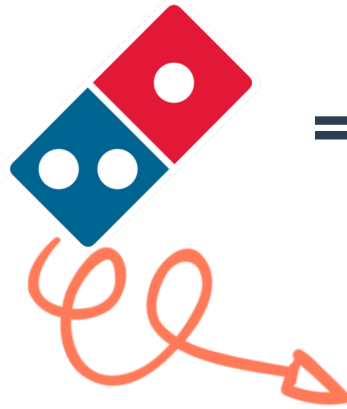
Patrick Doyle
Chief Executive Officer

Domino's

Voice of the Customer (or VOC)

The process of **listening** to customer feedback about their experience using a product or service, including their expectations, preferences, aversions, and overall satisfaction; it typically consists of both **qualitative and quantitative** data

📣 + 🀱 = Voice-of-the-Customer Optimization

ACTION-ORIENTATION

Voice of the Customer Optimization

The involved process of **listening** to customer feedback, **sharing** the results within an organization, **interpreting** feedback for themes, and leveraging it to develop and implement appropriate action plans to **facilitate** organizational improvement.

VOC

Voice of the Customer

makes you **aware** of
what your customers
want and how they feel

VOCO
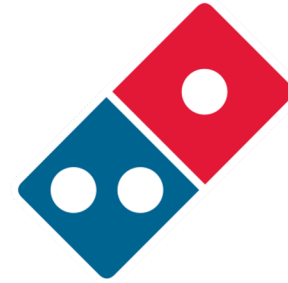
Voice of the Customer Optimization

gives your customers what
they want and turns them
into loyal customers

But Kevin, I don't sell pizza.

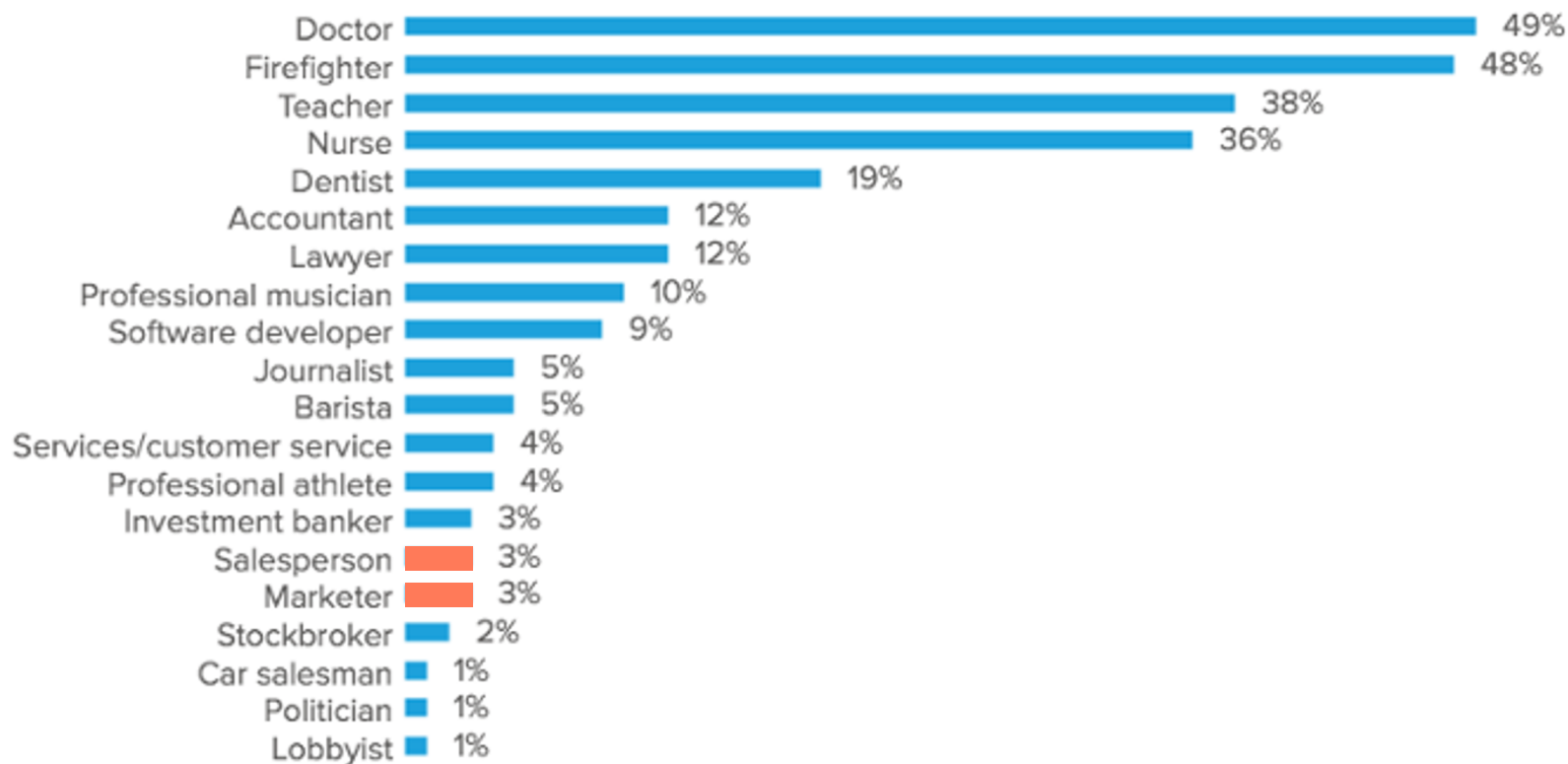**Then = Funnel**
Customers as an afterthought

Now = Flywheel
Customers at the center

Marketing

Sales

Customers

Service

Marketing
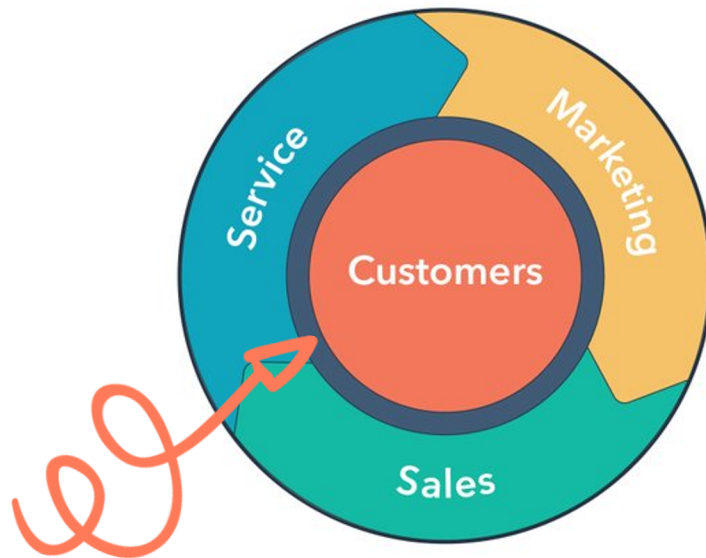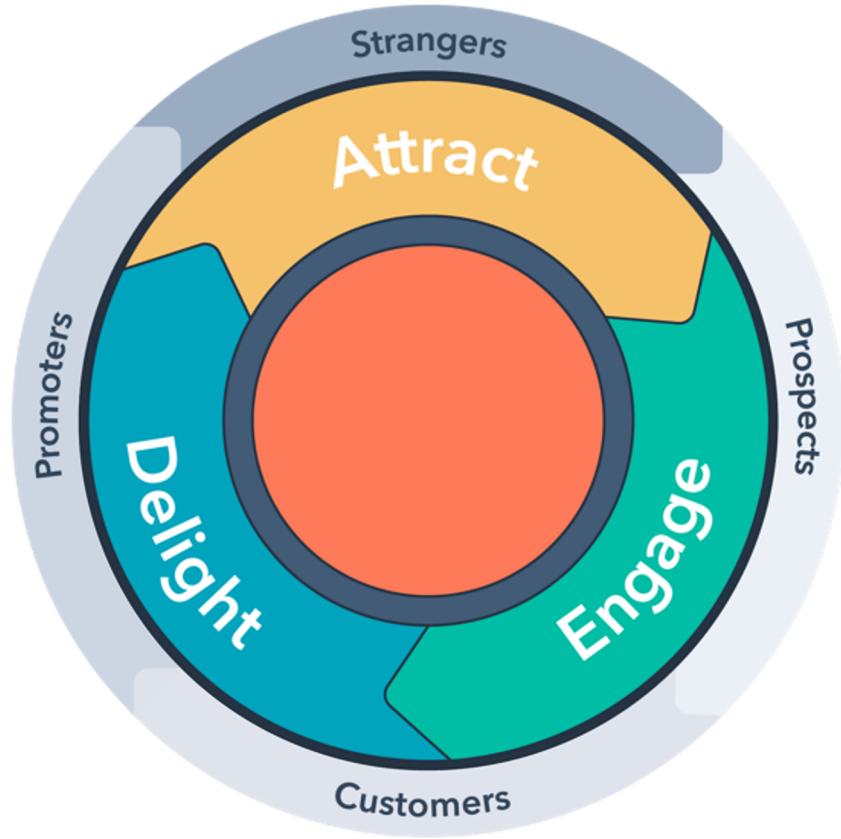
Customers

Sales

In a **flywheel model**, you restructure your business so that all teams, marketing, sales, and service, can support the attract, engage, and delight stages of the inbound methodology to apply more force to the flywheel to provide an amazing customer experience in every phase.

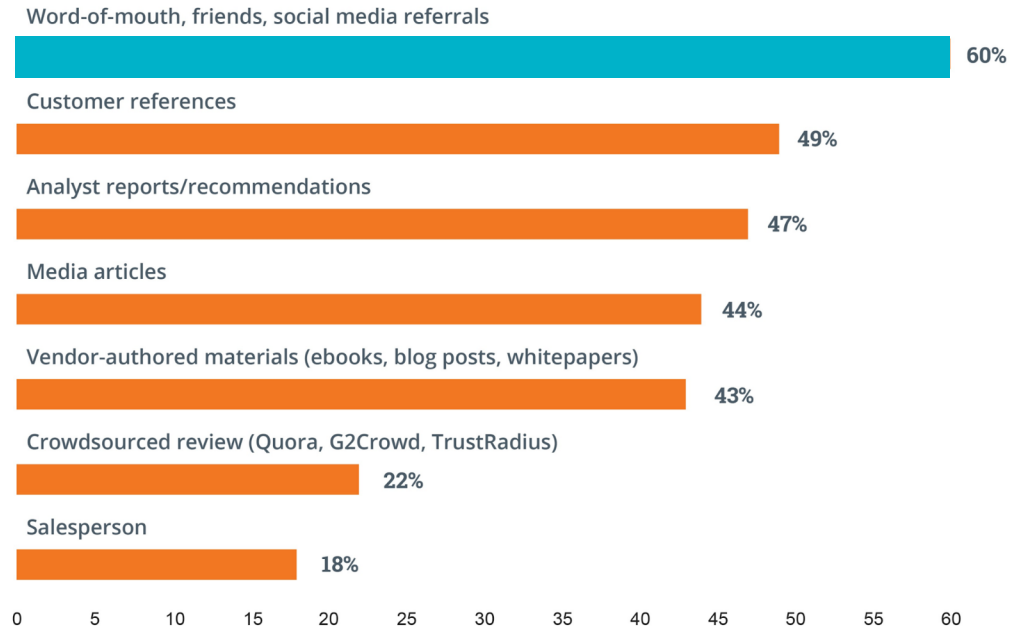Who do you consider to be trustworthy?

Profession	Percentage
Doctor	49%
Firefighter	48%
Teacher	38%
Nurse	36%
Dentist	19%
Accountant	12%
Lawyer	12%
Professional musician	10%
Software developer	9%
Journalist	5%
Barista	5%
Services/customer service	4%
Professional athlete	4%
Investment banker	3%
Salesperson	3%
Marketer	3%
Stockbroker	2%
Car salesman	1%
Politician	1%
Lobbyist	1%

Source: research.hubspot.com

Facebook Page Organic Reach
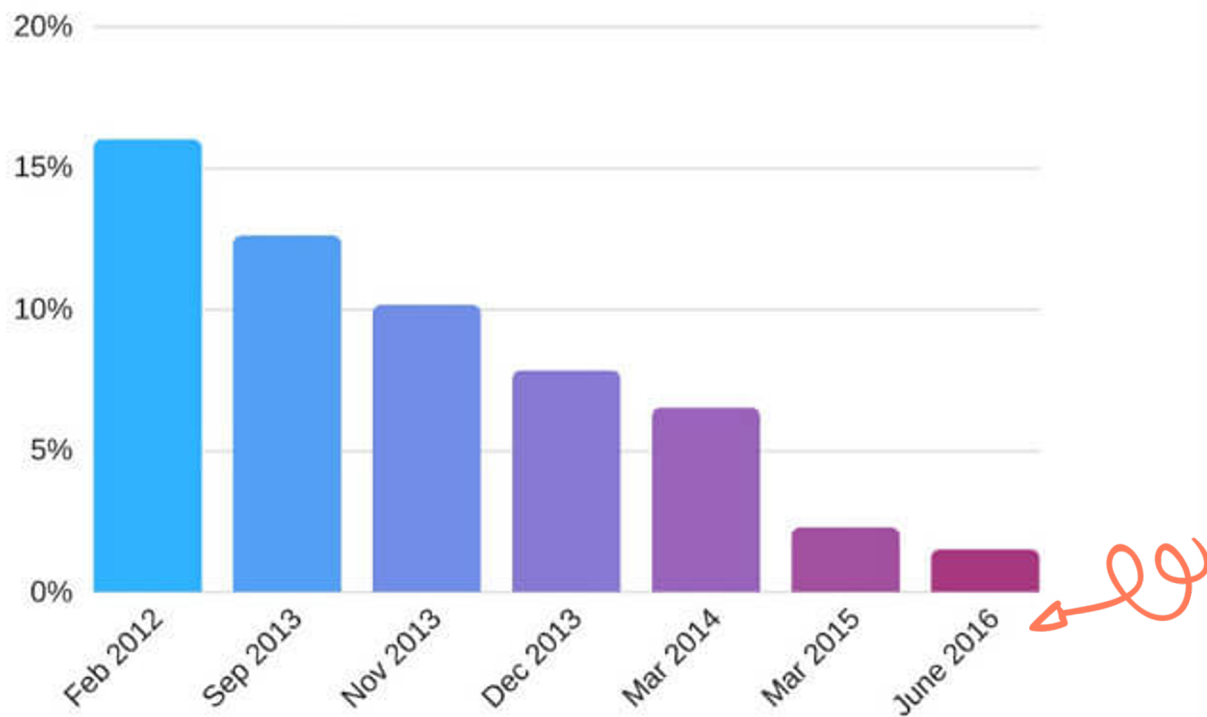
WHAT SOURCES OF INFORMATION DO YOU RELY ON WHEN MAKING PURCHASE DECISIONS FOR BUSINESS SOFTWARE?

Salespeople's credibility is at an all-time low

Word-of-mouth, friends, social media referrals

60%

Customer references

49%

Analyst reports/recommendations

47%

Media articles

44%

Vendor-authored materials (ebooks, blog posts, whitepapers)

43%

Crowdsourced review (Quora, G2Crowd, TrustRadius)

22%

Salesperson

18%

0   5   10   15   20   25   30   35   40   45   50   55   60

Source: research.hubspot.com

The Case for #VOCO

25x
It costs businesses **5x – 25x** more money to acquire a new customer than keep existing ones happy.

90%
Highly engaged customers **buy 90% more** often and **spend 60% more** per transaction.

60%
Companies who prioritize the customer experience generate **60%** higher profits than those that don't.

The landscape for how businesses market, sell, and service customers has changed. VOCO allows you to take advantage of these changes.

1. Gather customer feedback
2. Deliver exceptional customer service
3. Increase upsells, cross-sells, and referrals
4. Engage promoters for WOM, testimonials
5. Supplement channels with reduced reach
6. Lower CAC, increase LTV, improve profit

But Kevin, I provide exceptional customer service.

Are you in touch with your customers?

80%

of companies think they deliver **superior** customer service.

__%

of customers believe they experience superior customer service.

Are you in touch with your customers?

80%
of companies think they deliver **superior** customer service.

8%
of customers believe they experience superior customer service.

Agenda

People are tired of filling out surveys.

And they feel their feedback falls on deaf ears.

43%

43% of customers don't leave feedback because they believe the business doesn't care.

There are three primary customer satisfaction metrics you can capture from sourcing feedback with VOCO.

Choosing the right one comes down to **your goals.**

Survey

Goal

Question

Customer Satisfaction (CSAT)

Understand what customers think about a specific aspect of your product or service.
(i.e. customer onboarding).

How satisfied are you with your onboarding experience?

Customer Satisfaction (CSAT)

Customer satisfaction surveys help you understand the satisfaction levels of your customers at a particular moment in time.

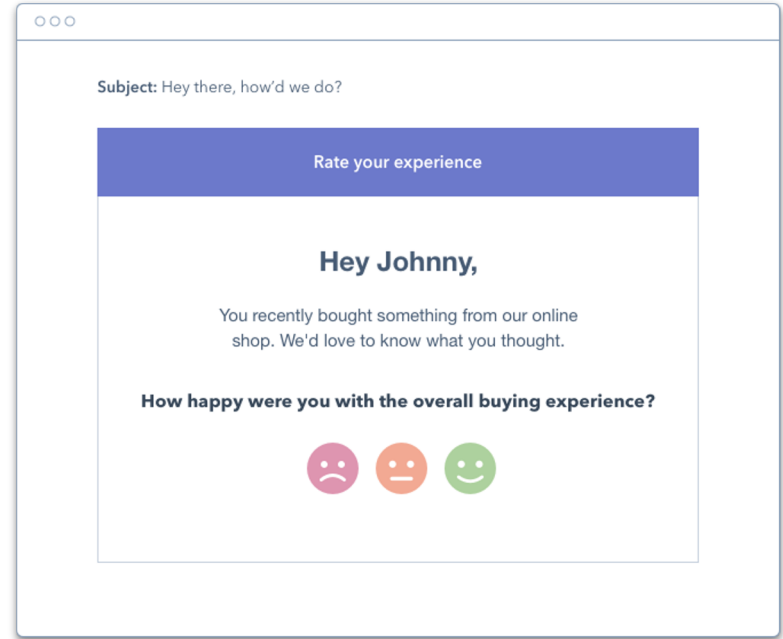| Survey	Goal	Question
Customer Satisfaction (CSAT)	Understand what customers think about a specific aspect of your product or service. (i.e. customer onboarding).	How satisfied are you with your onboarding experience?
Customer Effort Score (CES)	Identify how to improve your support or customer service experience.	How much do you agree or disagree with this statement: *company* made it easy for me to solve my issue.

Customer Effort Score (CES)

A type of customer satisfaction metric that measures the ease of an experience generally used to get a feel for how a support team and processes are working.

Survey	Goal	Question
Customer Satisfaction (CSAT)	Understand what customers think about a specific aspect of your product or service. (i.e. customer onboarding).	How satisfied are you with your onboarding experience?
Customer Effort Score (CES)	Identify how to improve your support or customer service experience.	How much do you agree or disagree with this statement: *company* made it easy for me to solve my issue.
Net Promoter Score (NPS)	Understand the overall experience customers have with your product or service over time.	How likely are you to recommend company to a friend or colleague?

Net Promoter Score (NPS)

A metric that measures the overall customer experience of your brand. To calculate, subtract the % of detractors (0-6) from the % of promoters (9-10).

From: Biglytics

Subject: Hey, how are we doing?

Share your feedback on Biglytics

Your opinion matters.

Please take a moment to rate us from 0-10 below.

How likely are you to recommend Biglytics to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

Not at all likely   Extremely likely

Primary Customer Satisfaction Metrics

Net Promoter Score (NPS)

How likely would you refer to a friend or colleague?

Customer Effort Score (CES)

How easy did we make it to achieve your goal?

Customer Satisfaction Score (CSAT)

How satisfied were you with your experience?

Pro tips for increasing your survey response rates:

- Personalization

- Simplicity

- Preparation

Improve Your Response Rates

Personalizing the Survey Experience

✔ Use personalization tokens in your survey email subject lines to contextualize by customer, industry, product, and service.

✔ A/B test subject lines to continually improve your open rates and response rates.

✔ Make your survey accessible to all by delivering it in-language and with a mobile optimized experience.

✔ Improve email deliverability by sending it from a real person on your business domain and filter out your unengaged contacts.

Improve Your Response Rates

Simplify the Survey Process

- ✓ Surveys that open with a multiple choice question have an 89% completion rate (vs. 83% for open-ended questions).

- ✓ Shorten the survey to ask only what's critical and have the quantitative score in your email.

- ✓ Focus on copywriting to make your survey easy to understand, easy to answer, and jargon-free.

Improve Your Response Rates

Prepare Your Users for the Survey

- ✓ Alert your customers ahead of time that they'll be receiving a survey email and to keep an eye out for it.

- ✓ Share context and the survey's purpose with your customers as to why you're asking for them to complete the survey.

- ✓ Be considerate of your customer's time and confirm the exact time commitment, even if its minutes.

- ✓ Test the email send, test the survey, test the thank you page, and test mobile vs. desktop to ensure everything works.

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HubSpot's Feedback Framework

Primary Customer Satisfaction Metrics

Net Promoter Score (NPS)

How likely would you refer to a friend or colleague?

Customer Effort Score (CES)

How easy did we make it to achieve your goal?

Customer Satisfaction Score (CSAT)

How satisfied were you with your experience?

Quantitative data can tell you if something is **wrong**, and qualitative can tell you **why.**

Understanding customer sentiment:

- Calculate and track satisfaction metrics

- Identify the themes and root causes for feedback

- Start categorizing common themes and patterns

All responses

87 responses

+ Add filter

≡ Date range

SENT	DELIVERED	OPENED	RESPONSES	RESPONSES WITH COMMENTS
4,414	4,306	908	87	58

Your NPS score ⓘ

🙂 **64%** Promoters

- minus

🙁 **29%** Detractors

= **36 NPS**

How your customers are feeling ⓘ

28.74% (25)

6.9% (6)

64.37% (56)
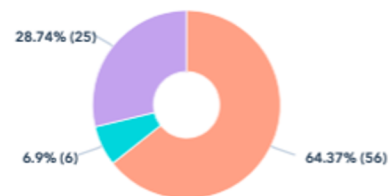
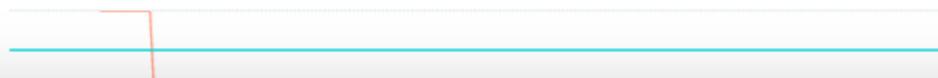### How your customers are feeling over time ⓘ

○ Score — World Class

100

Five Whys

An iterative interrogative technique used to explore the **cause-and-effect** relationships underlying a particular problem.

Feedback — *"Can't wait until I don't have to use your product anymore."*

Why — *"Still waiting for a resolution on my issue after 3 weeks."*

Why — *"It was a technical question and our support team was waiting on the product team to answer."*

Why — *"The product team doesn't have good visibility into issues so questions are easily lost in the cracks."*

Why — *"We don't have a good system for communicating on issues across functions."*

Why — *"We never put processes or systems in place to facilitate cross-functional collaboration."*

Feedback types:

- Functionality

- Feature requests

- Usability

- Reliability

- Customer service

- Billing

Categorization Process

Feedback	Feedback Theme	Feedback Type
"I love your product! I wish you had better reporting though…"	Reporting	Functionality
"Your team is incredibly slow in responding to me when I reach out…"	Slow Response Time	Customer Service

HubSpot's Feedback Framework
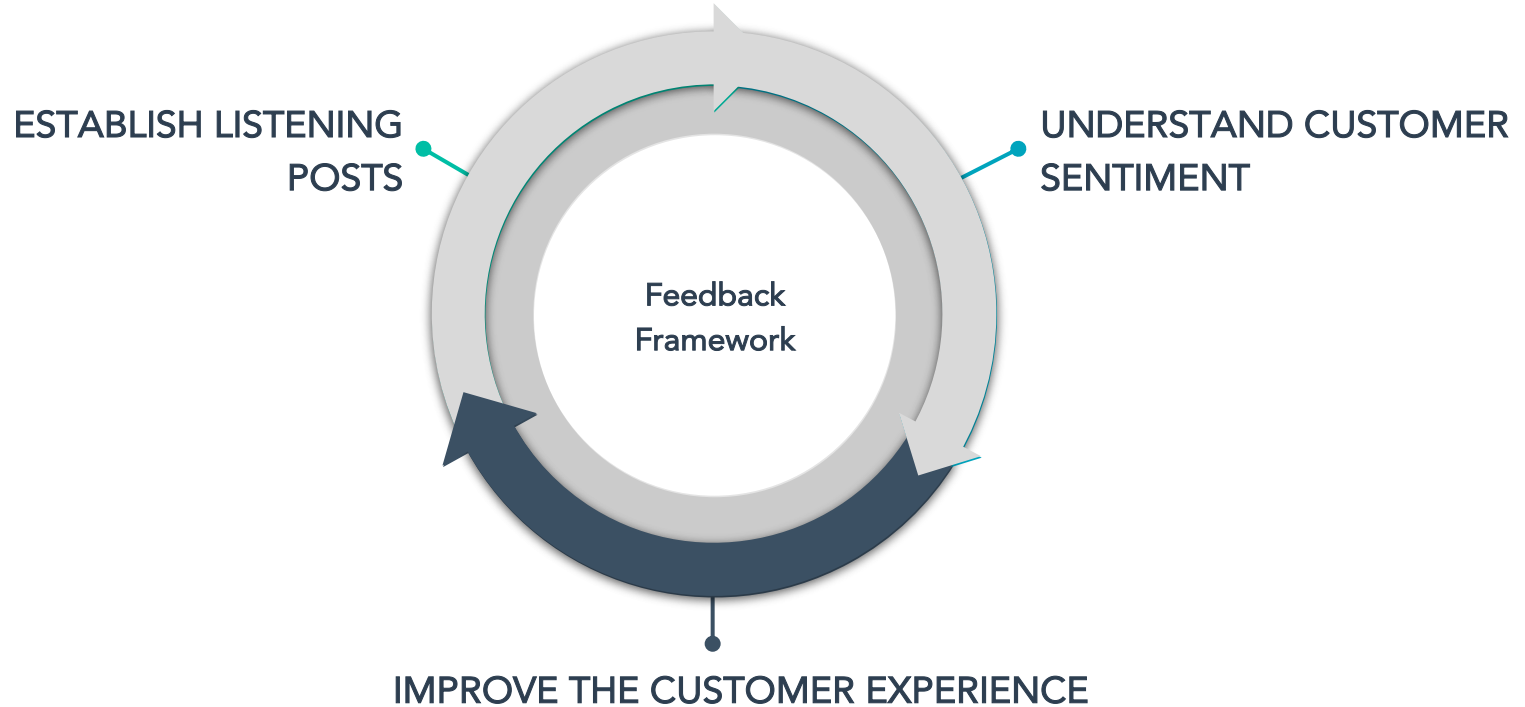
ESTABLISH LISTENING POSTS

UNDERSTAND CUSTOMER SENTIMENT

Feedback Framework

IMPROVE THE CUSTOMER EXPERIENCE

Improving the customer experience:

- Prioritize changes that matter

- Develop and implement action plan

- Measure and share progress

- Follow up 1:1 with customers
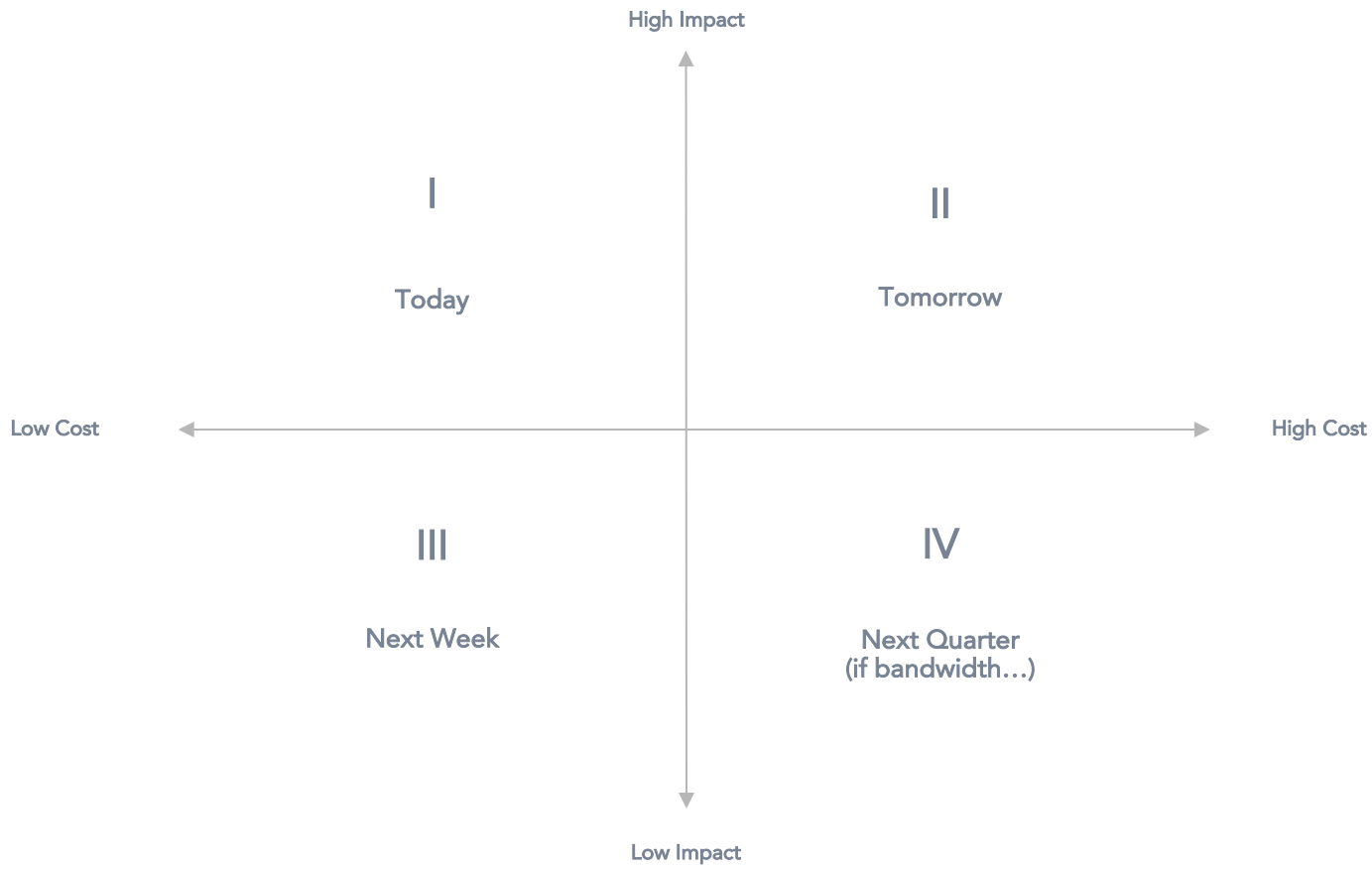
Improving the customer experience:

- **Prioritize changes that matter**

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- Follow up 1:1 with customers

Feedback Theme	Feedback Type	Frequency
Reporting	Functionality	50
Slow Response Time	Customer Service	23
Complicated Contracts	Billing	5

High Impact

I

Today

II

Tomorrow

Low Cost

High Cost

III

Next Week

IV

Next Quarter
(if bandwidth…)

Low Impact

Improving the customer experience:

- Prioritize changes that matter

- **Develop and implement action plan**

- Measure and share progress

- Follow up 1:1 with customers

Develop a customer experience task force internally:

- Participation vs. passive observation

- Buy-in to the prioritized themes and types

- Dedication of organizational resources

- Reinforcement of CX culture

- Decision-making ownership

- Barrier removal to achieving mission

The DARCI Model

| Decision Maker | Accountable | Responsible | Consulted | Informed |

Improving the customer experience:

- Prioritize changes that matter

- Develop and implement action plan

- **Measure and share progress**

- Follow up 1:1 with customers

NPSBot APP 8:28 PM

NPS=1 at Aug 13 8:27 PM
far too buggy.

2 replies   Last reply 3 hours ago

NPSBot APP 9:28 PM

NPS=3 at Aug 13 9:26 PM
it keeps locking up or breaking or not recording calls
@re███e

2 replies   Last reply 3 hours ago

NPSBot APP 9:33 PM

NPS=10 at Aug 13 9:30 PM
Allow us to make a report for a months worth or email sends.
@a██████e @ee██████n

slack

Improving the customer experience:

- Prioritize changes that matter

- Develop and implement action plan

- Measure and share progress

- **Follow up 1:1 with customers**

43%

43% of customers don't leave feedback because they believe the business doesn't care.
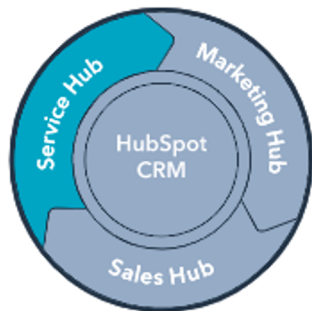
Following up with customers who provided you with feedback:

- Personalized email templates

- Handwritten notes

- Published report with findings

- Phone calls or video meetings

- In-office visits

Agenda

Service Hub

Customer service tools to help you connect with customers, exceed their expectations, and turn them into promoters that grow your business.

See the full list of tools available in HubSpot.

CUSTOMERS

PROMOTERS

ORGANIZE & TRACK CUSTOMER COMMUNICATIONS

- Ticketing
- Conversational Bots
- Live Chat
- Calling
- Conversations Inbox
- Team Email

HELP & DELIGHT CUSTOMERS AT SCALE

- Knowledge Base
- Email Sequences
- 1:1 Video
- Task Automation
- Templates
- Ticket Automation

MEASURE & IMPROVE CUSTOMER EXPERIENCE

- Time-to-Close Reports
- Tickets Closed Reports
- Customer Surveys
- Rep Productivity Performance
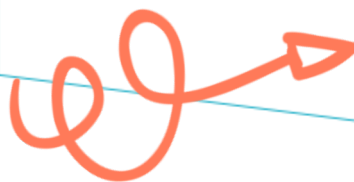
Sourcing Feedback

From: Biglytics

Subject: Hey, how are we doing?

Share your feedback on Biglytics

Your opinion matters.

Please take a moment to rate us from 0-10 below.

How likely are you to recommend Biglytics to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

Not at all likely   Extremely likely

Subject: Hey there, how'd we do?

Rate your experience

Hey Johnny,

You recently bought something from our online shop. We'd love to know what you thought.

How happy were you with the overall buying experience?

🙁 😐 🙂

From: Biglytics

Subject: Hey Johnny, how was your support experience?

How did we do?

Hey Johnny,

You recently asked us for help with a
'234534 Importing contacts' issue.

We want to give customers the best help and support possible.
Please help us by answering this question.

To what extent do you agree or disagree with this statement?

Biglytics made it easy to handle my issue.

1 2 3 4 5 6 7

Strongly disagree   Strongly agree

Tracking Satisfaction Metrics
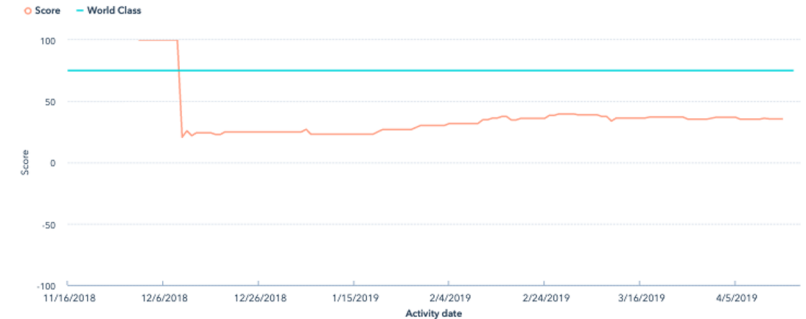
Your NPS score ⓘ

🙂 **64%** Promoters

– minus

🙁 **29%** Detractors

= **36 NPS**

How your customers are feeling ⓘ

28.74% (25)

6.9% (6)

64.37% (56)

How your customers are feeling over time ⓘ

○ Score — World Class

Score

100

50

0

-50

-100

11/16/2018   12/6/2018   12/26/2018   1/15/2019   2/4/2019   2/24/2019   3/16/2019   4/5/2019

Activity date

Survey Response Automation

Automation

Set up actions that are triggered by a contact's survey response. Perhaps you'd like to send a follow-up email inviting detractors to schedule a meeting with you to discuss their issues.

When a survey response is
● **0 - 6 Detractors**

＋

📋 Create a task

"Send care basket" and assign to Annabel Consilvio.

＋

Need more advanced functionality?
Open in Workflows

When a survey response is
7 - 8 Passive

＋

📋 Create a task

"Follow up to resolve their issue" and assign to Annabel Consilvio.

＋

Need more advanced functionality?
Open in Workflows

When a survey response is
● **9 - 10 Promoters**

＋

✉ Send internal email notification

"Request testimonial" to Deal owner

＋

Need more advanced functionality?
Open in Workflows

Alerting Team on Low Scores

Following Up With Customers

Referrals: The Ask

Hello [Customer name],

I'm so glad to hear you're happy with the results of working with [Your company name] so far. I knew we could help, and I'm pleased you're seeing results so quickly.

Since things are going so well, I found myself wondering if you have any colleagues at similar companies who would benefit from our [product/service]. I would love to help them achieve similar growth.

Regards,

[Your name]

Send

Referrals: The Intro Template

[Referral],

I don't know if I've mentioned it before, but I've been working with [CSM name] for a few months. The other day, I was talking with her about some of the things she and I have done, and I realized I should put you two together. So...

[Referral], meet [CSM, with a LinkedIn profile URL].

[CSM], meet [Referral, with a LinkedIn profile URL].

Can I leave the rest to you guys?

Talk to you both later.

Regards,

[Your name]

Send

Referrals: The Thank You

Dear [Referral Source],

Thank you for referring [Referral Name] to me for [Your Product/Service Offering]. [Referral Company] is a big organization, and I sincerely appreciate your vote of confidence in my abilities by referring them to [Your Company]. We're going to work together on [Services/Project/Initiative] over the next several months, and hopefully [Product/Service Offering] will be as helpful for them as it has been for you.

As a token of my appreciation, here's a promo code for 10% off your next purchase from us.

Thank you again for connecting me with [Referral Name], and I look forward to talking again soon.

Kind regards,

[Your name]

Send

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6. **Questions**

Thank you for joining us!

Follow Up Questions?

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(480) 720-8552

@PrismGlobalMKTG