



The Executives Guide to

# Building a Real Customer-First Business



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## Customer-Centric Yet? If Only...

Today's B2B customers expect more from partners than ever before. That's not a secret, but it bears repeating for one simple reason: companies can't meet customer expectations in a meaningful way if they don't put their customers first.

In an ideal, customer-first world, businesses provide consistent personalized interactions, engage in proactive support, and develop product and service roadmaps that closely reflect customer requests. If a business can check these boxes, business customers are happy.

But the reality is often very different from this. Many B2B teams are still relying on legacy tools, technologies, and workflows that inhibit their ability to truly know, support, and grow their customer base. They have no way to get full contextual knowledge of each customer, which limits business relationships to a reactive role with just a few select options available for resolving issues. There's also no way to capture information from customer interactions, so other business stakeholders — like sales — can't learn from them and grow the customer base effectively. Most organizations are aware that they need to become more customer-centric, but without better insights and tools, they fall far short of the goal.



Becoming a customer-centric business is possible, though, with the right guidance. You can transform your customer success and support team from an under-resourced and undervalued cost center into a business enabler that helps the entire company better understand and serve its customers — using the right technologies, processes, and insights to help you get there.

**This guide will show you the best ways to truly know your customer, support their individual needs, and uncover previously hidden opportunities necessary for growing your business.**

# 61%

of customers say it's difficult for a company to earn their trust.<sup>1</sup>

# 1 in 3

customers will walk away after just one bad experience.<sup>2</sup>

# 80%

of customers say experience is just as important as a company's products and services.<sup>3</sup>



## Confronting the Problems with Customer Information and Systems

Over and over, the enemies of customer-centricity turn out to be customer data and systems that don't talk to each other and create more problems than they solve. Everyone has data, everyone has systems, but seamlessly connecting the two proves difficult for companies to do.

### Consider this common scenario:

An organization uses a standalone ticket management system that doesn't integrate with Salesforce or other customer-based applications. The customer support team doesn't have a live chat or dedicated customer success tool either — or if they do, it has limited front- and back-end functionality. When agents provide pre- and post-sales support, they have to toggle between different tools to get the relevant information they need, which is extraordinarily time-consuming and also confusing, since there's no unification or context around the info they're seeing.

It gets worse. Because there's no single source of truth, no one can get visibility into other crucial customer data, resulting in inappropriate or uncomfortable interactions that end up creating and even exacerbating issues rather than making them better.

Think about the awkward exchange that happens when sales reaches out to a particular customer for an upsell, but has no idea the customer's account is past due or that they've recently submitted a major bug and are awaiting resolution but haven't yet received any follow-up communication about it.

Taking it further, with limited visibility into account health, there's no way for the organization to measure customer churn vs. renewal. And without the ability to run deep analytics, there's also no way to identify underlying customer trends. Problems go unresolved, trends go unnoticed, customer requests die on the vine, and relationships sour past the point of redemption.

### Sound familiar?

Bottom line: customer support teams are doing their best with disparate systems, hazy customer understanding, and tools that can only produce reactive and inconsistent results. And while they might experience successes from time to time, the potential or true customer-centricity stays unmet, therefore stunting business growth.



## Rising to the Customer-First Challenge

If customer success, support teams, and enterprises overall are going to rise to the customer-first challenge, they need a more proactive support model — one reinforced by technology that can provide a 360-degree perspective of anyone that interacts with a customer and simultaneously creates valuable context and intelligence with each interaction. When each customer's experience is put into the right context, organizations can identify new business opportunities and proactively address unhappy customers who might be on the verge of walking away. They can also scale the solution to grow with the business as it matures.

### But that's only half the battle.

The other lurking concern is that there is rarely enough focus on the existing customer pipeline. Many organizations invest the bulk of their time and resources on the pre-sales pipeline by nurturing prospects through each successive stage of the buying cycle, but they spend considerably less attention on post-sale interactions. Unfortunately, they neglect this at their own peril, since a significant portion of revenue usually comes from existing customer renewals and expansions.

**Loyal customers are 5x more likely to purchase again and four times more likely to refer a friend to the company.<sup>5</sup>**

Just

**23%**

of revenue comes from new accounts, while

**77%**

of revenue comes from retained customers plus growth via upsells and cross-sells.<sup>4</sup>

Compounding these issues, it's all too easy to stay entrenched in a traditionally reactive and transactional approach, in which a customer support team's only job is to check off the boxes when tickets come in. Because most support teams have always operated this way, it's difficult to see how support can proactively collaborate with sales and other teams to stake out a more customer-centric posture.

Better tools and workflows for customer support teams can go a long way toward improving outcomes and ensuring the whole organization achieves greater customer understanding. But along with that, the traditional notion of customer support has to be challenged. Looking at customer support through a modern lens means taking into account how customer needs and expectations have changed in recent years. It also means understanding the unique opportunity to turn a historical operational weakness into a business-defining strength.

<sup>4</sup> Bills, Amy; Ferron, Paul. "Three Ways to Protect Your Customer Base from Competitors." Forrester, March 10, 2021.  
<sup>5</sup> Blake, Morgan. "100 Stats That Prove The Value Of Customer Experience." Forbes.com, September 21, 2019.

## Redefining Customer Support

The first step is to move away from the concept of “customer support” to “customer engagement.” Redefining customer support by putting more focus on engagement shifts your business culture toward the concept that your customers are actually one of your biggest business strengths, and not something to be placated or feared.

Seeing your customers as a strength also makes it easier to be proactive. Instead of simply reacting to every challenge as it happens, a proactive support team can seek out the knowledge they need to anticipate customer needs and respond to them quickly and appropriately, using the best methods and channels.

Both sales and support are able to work together to engage customers throughout the buying journey, nurturing customer relationships and increasing account value. Instead of simply chugging along as a cost center, your support organization adds real value and transforms into a true business driver.



# 82%

of top-performing companies pay close attention to the human experience around digital and tech.<sup>6</sup>

## Best Practices + Technology = True Customer Centricity

With this change in mindset, you can then lay the practical groundwork for becoming a customer-centric business, leveraging a combination of technology and best practices:

### 1. Know Your Customers.

Few things are as powerful or memorable to your customer as a truly personalized experience that demonstrates your commitment to and understanding of them. Whether it's simply congratulating them for announcing they reached a business goal you knew was a top priority or sharing some in-depth tips for improving their business based on their interactions with your brand; a long-lasting and more profitable customer relationship begins and ends with deeply understanding who your customer is, what they care about, and how your team can help theirs stay on top of their game.

Start by using the rich customer information from your CRM to better understand how and to what extent individual customers are using your product or service. Low adoption or just using a feature here or there when your solution is expansive and robust might be a potential warning signal. This data is also helpful for evaluating customer renewal situations — when their renewal is scheduled, have they renewed in the past, and are renewal levels roughly equivalent? — from which you can glean whether another

<sup>6</sup> "Experience is everything: Here's how to get it right." PwC. 2018.



renewal is likely, or if you need to take immediate action to recover the relationship. Diving deeper, calculate and visualize customer satisfaction (CSAT) and Net Promoter Scores (NPS) to understand customers' overall satisfaction with your company and their level of brand loyalty. You can also measure the happiness and distress of customers by reviewing chat histories and support requests, particularly honing in on the number of open tickets, how many of them are urgent, and how many are submitted within a given period of time.

From there, determine how frequently you should be reaching out to customers and through which channels. Aggregate as much data as possible to lend greater context to customer interactions, including an understanding of each customer's business objectives and other pertinent information such as renewal dates, previous purchases, and lifetime value of the account.



**82%**

of U.S. customers say human interaction matters.<sup>7</sup>

Fully engaged customers represent a

**23%**

higher share in profitability, revenue, and relationship growth.<sup>8</sup>

## 2. Support Your Customers.

Customer support is most effective when you add or retain a human element and recognize that humans are excellent at certain things that technology is not. Knowledgeable human agents can act as both a partner and catalyst for customers to reach their own business goals, helping to solve complex problems and making deeper, more nuanced connections between customer wants and needs and their data.

It's also important for support teams to be available whenever, wherever, and however your customers prefer, providing omnichannel communications with complete context. Integrate support tools into all channels for simplicity, efficiency, and productivity to reduce the time to resolution and minimize negative interactions. Finally, emphasize internal collaboration by spreading institutional knowledge among various teams to create a consistent customer experience across agents and contacts.

<sup>7</sup> "Experience is everything: Here's how to get it right." PwC. 2018.  
<sup>8</sup> "Turning Customers Into True Believers: Customer Engagement." Gallup.



### 3. Grow With Your Customers.

With an understanding of account health and distress, you can determine the type of customer outreach to prioritize, as well as analyze the growth potential inside your customer base to identify additional revenue opportunities.

You can enable customer growth by handling renewals in a faster and more seamless way, finding and capitalizing on more upsell and cross-sell opportunities, engaging in proactive problem-solving, and transforming customers into advocates. It's also critical to streamline your company's operations and reduce costs. When you eliminate wasted time and effort and become more cost-effective, you can spend more of your resources on customer growth initiatives.

## TeamSupport: Built for B2B Customers, Critical for Customer Centricity

Many customer support and engagement platforms are built to serve both B2B and B2C customer bases. But B2B customers are unique from B2C in just about every aspect and should be managed differently.

With TeamSupport, B2B companies can significantly grow customer lifetime value by increasing customer satisfaction, engagement, retention, and expansion through deeper insights and actionable customer intelligence.

The solution aggregates data across the post-sale customer journey, tracking and tackling everything from support request frequency to renewal history and virtually everything in between. Now, internal teams — sales, marketing, customer success, and others — can collaborate to resolve customer problems faster and more proactively, while consistently delivering the best possible customer service to empower the entire organization to become more customer-centric.

**“TeamSupport does everything we need from handling incoming customer queries to keeping an up-to-date Knowledge Base. It’s a Support system that feels like it was designed by Support People.”**

- Nick Toone, SoCo Cloud



## Purpose-Built Tools To Manage Your Most Valuable Assets: Customers

Customers are the lifeblood of your business and TeamSupport's solutions are purpose-built to make engaging, managing, and retaining valuable customers simpler and more strategic than ever. With TeamSupport, your entire organization can connect and engage with customers throughout the entire customer lifecycle, using high-value and flexible tools to manage everything from support requests to customer advocacy opportunities.

### Customer and Ticket Management

TeamSupport's help desk software allows users to promptly resolve tickets and requests. It consolidates every customer interaction to provide a current and historical record for easier management, showing every ticket, request, or issue that any person within a given client company has made to the support department. Customer health and distress monitoring assesses when a

customer might be getting frustrated and alerts the support team with a heads-up. The Customer Distress Index (CDI) assigns a number to every customer based on ten custom variables, such as how many tickets they currently have open and the average ticket resolution time. The higher the CDI, the lower the customer health, indicating an at-risk customer that requires appropriate outreach.

### Insights Into Support Performance

A customizable dashboard with analytic capabilities powered by AI enables users to gain much-needed insight into customer support performance. Users can analyze everything from the strengths and weaknesses of agents to the health of the support ticket backlog to overall customer satisfaction.

Support teams can use the information to identify gaps in processes and areas where improvements in efficiency need to be made. They can also pinpoint where efforts can be made to boost CSAT scores.

## The Value of Post-Sale Customer Service Experiences in B2B

[Read Now](#)



## Real-Time Digital Conversations

TeamSupport also features live, automated engagement tools with intelligent routing that extends to meet your customers where they live, no matter the stage of your company's maturity. The interactive live chat solution seamlessly connects each of your customer-facing teams — sales, support, customer success — across all locations, languages, and departments without the need to buy duplicative licenses.

Now, you can tailor your specific tech environment to accommodate the unique needs and operations of your business to create a unified experience that keeps conversations online when transferring from one team to another, helping every team member gain valuable background information about the customer and eliminating the annoyance and inconvenience of customers having to repeatedly explain their situation after a transfer.

In many ways, you can think of the real time digital conversation and engagement platform as the horizontal glue that ties all systems together.

Chat is no longer just chat. It is no longer just a channel. It is a true omni-channel experience and the vehicle over which continuous conversations are delivered. Whether it's human agents, custom-built bots, advanced routing, proactive chat, SMS, social channels, or post chat surveys, TeamSupport captures and amplifies the essence of what defines long term customer relationships: continuous conversations.

## Tools to Increase Success

Customer support teams can get proactive alerts about customer churn, upcoming renewals, and expansion opportunities. Using the information, they can create and track success milestones throughout the buying journey, monitor customer health along the way, and adjust support delivery and other practices to strengthen customer relationships.



**Engage Customers**  
& deliver world-class  
customer experiences.

# How to Use TeamSupport



## Customer Success Management (CSM) and Support

With real-time access to a single source of truth about each customer, CSM and support teams can guide and personalize each interaction instead of conducting multiple handoffs of the customer through various chat systems and agents and making the customer repeat themselves. Faster time to resolution and an increase in one-call resolution are powerful ways to improve customers' confidence and loyalty.

Teams can also see at a glance which accounts are at risk or have a heavy volume of support tickets and proactively reach out to them — which has the added bonus of improving customer success and support teams' productivity because they can properly prioritize their customer interactions. More importantly, it's also a way to uncover new revenue opportunities among your happiest customers, but ones who haven't necessarily raised their hands to show they want to buy more.

Unlike many customer success and support solutions, TeamSupport's CSM solutions enable customer success teams to take a truly proactive approach to managing customer relationships.

Now, customer success members can quickly identify warning signs like low product usage poor adoption to create new, high-value offerings like ongoing training or upgrades

that improve the customer's experience and the business's bottom line.

With the information gathered through each customer interaction, leadership and other stakeholders can conduct quality, in-depth quarterly business reviews and strategic planning — including internal reviews of their own team's performance and address potential weaknesses to continuously enhance their ability to deliver a superior customer experience.

## Sales

Sales can use the same up-to-date customer information to upsell complementary products and services and cross-sell other solutions and service offerings. With greater revenue opportunities at hand, they can increase the average value of each order and the overall lifetime value of each customer. But beyond conventional selling, sales teams can also use this opportunity to enhance the customer experience by listening to customer feedback or concerns and connecting them directly with another team member who can help.

The handoff occurs in real time, replacing inconvenient disconnections and call backs with a seamless, customer-centric conversation in which every team uses the same information to address a customer's questions, comments and concerns — all without having to buy duplicate licenses for both the support chat and sales chat solutions.



## Marketing

In the marketing world, teams can use customer data to target and personalize campaigns for greater customer conversion. They can accelerate product development by using historical data to help influence decisions. And they can create customized discounts or promotional offers that reflect customers' affinity for various products and services based on historical transactions and online behaviors.



## Benefits

With comprehensive technologies that allow you to engage with customers effectively and record, share, and analyze customer support data, your organization can:



**Gain much deeper insight into customers** to anticipate and respond effectively to their needs at each phase of their buying journey.



**Increase customer satisfaction and reduce churn** by providing more efficient, personalized, and proactive support and problem-solving.



**Help sustain and even increase revenue** with faster, seamless renewals; fewer renewal lapses; and the discovery of more upsell and cross-sell opportunities.



**Boost customer loyalty** and transform customers into advocates.



**Enable business** with more informed, confident, and competent support staff.

## Rethinking Customer Relationships

Becoming a customer-first business requires today's B2B companies to rethink customer relationships. Instead of focusing narrowly on post-sales support, companies can emphasize customer engagement throughout the entire buying journey. And with the implementation of new customer support solutions that create valuable customer knowledge and lend context to each interaction, companies can get to know, support, and grow their customer base as they never have before.

When you put your customers at the center of your business, you can:

- ✔ **Proactively support and expand individual customer accounts**
- ✔ **Enable overall growth and reduce churn**
- ✔ **Inspire stronger customer loyalty**
- ✔ **Earn greater incremental revenue from existing customers**
- ✔ **Gain a competitive advantage over others still using ineffective legacy technologies**



**Schedule a demo.**

TeamSupport provides a comprehensive suite of technologies that help you to keep your customers at the center of everything you do.

To learn more, schedule your free personalized demo.

[Schedule Demo](#)