



# CONTEXT: THE KEY TO A GOOD RELATIONSHIP

**Three reasons to leverage customer information to build  
better relationships**



Customers often think, *"What difference does it make whose service I use? They're all the same, they're all sub-par, and none of them care about me."*

But what if you could use your customer's very own information to set yourself apart from your competition? What if you could leverage customer context — by capturing it, storing it, analyzing it, and then acting upon it — to improve the customer experience, inspire loyalty and expand the relationship through additional services and products? It would be silly to ignore it, right?

In this ebook, we're going to discuss how context:

- 1. Improves the customer experience**
- 2. Inspires customer loyalty**
- 3. Increases the customer lifetime value**

Context gives you a holistic view of the individual customer and helps you create an aggregate view of your customer base. Context is everything — every interaction your customer has with your business, regardless of channel. But all of that information is meaningless if you don't do anything with it.





ARE YOUR  
CUSTOMERS ONLY  
WITH YOU BECAUSE  
THEY HAVE TO BE?



OR BECAUSE THEY  
WANT TO BE?

A grayscale photograph of a man and a woman looking at a smartphone together. The man is on the left, holding the phone, and the woman is on the right, looking at the screen. They are both smiling and appear to be engaged in a conversation. The background is blurred, suggesting an outdoor setting.

# USING CONTEXT TO BUILD BETTER CUSTOMER RELATIONSHIPS

From a general standpoint, context clarifies meaning. Let's say your customer calls customer service and is immediately upset and takes it out on your agent. If your agent already knows that, for example, the customer's internet isn't working, the agent can immediately address the known issue and then find out if there are other issues. However if your customer has to enter her account number again and then state the problem again, her rage is bound to rise.

Since the voice channel remains the most popular method of contact — especially when there's a problem — a product like VHT Agent Assist reduces customer effort, automates warm transfers and provides agents with informative and useful screen pops that empower them to solve the customer's issue quickly. If you can't solve an issue or complete a transaction quickly, don't be surprised if the customer bails. Salesforce Research found that 73% of consumers are likely to switch brands because of inconsistent customer service; 66% are likely to switch companies if "they feel like they're treated like a number rather than an individual" (2016 State of the Connected Customer).

Having customers start all over when they change channels isn't good cross-channel management. Context enables businesses to provide the personalized service that customers expect, and context can help companies learn the best channels for solving certain problems, which can help with resource allocation and budget. You can break down your survey results by problem, by channel, and by customer satisfaction. Then you know when it's best to transfer customers (just make sure they're good transfers!) and where to add more resources when certain events happen (like an outage or new product launch).



## WHAT IS A MEANINGFUL SCREEN POP?

Screen pops are common in the customer service world, but what do we mean by “meaningful”? We mean include more than just the customer account number and latest billing date. According to Salesforce, 68% of consumers believe it’s critical that agents know their history. To that end, we recommend customizing the screen pop with key background information, previous or most popular channels for communication and most recent survey results. By implementing a simple color-code on the screen pop, you can give the agent a heads up that the customer loves your business or that the customer may be upset about past challenges. This preparation will help your agents provide great, empathetic customer service from the first “hello.”





# CREATING LOYAL CUSTOMERS

Customers choose to do business with you, and when you act like they're unimportant or that each interaction is brand new, you make it seem like they're not important to you. Leveraging context enables you to prove that your relationship to the customer matters, and it's amazing what can happen when customers know you care.

Context can tell you how your customers want to interact with you, and context can alert you before a customer strays. By paying attention to that, you're showing the customer that their time and preferences are important to you. If a customer always contacts you via Facebook, don't make them call you unless it's absolutely necessary. If a customer wants to talk, don't force them to your website and hide your phone number. And maybe even more importantly, make sure the flow between channels is smooth and consistent, because 75% of customers expect a consistent experience no matter where they engage with your business (2016 State of the Connected Customer, Salesforce Research). According to the report, "Customers seek to be consistently recognized and remembered across every interaction and communication channel," and a well-designed context engine makes it easy for businesses to implement great cross-channel experiences that customers will remember.

Surveys are a vital piece for growing relationships with customers, but doesn't it seem like survey results are usually just cherry-picked by the marketing department without operations ever seeing, much less acting upon the results? A context engine like VHT Navigator makes it easy to capture, store and use the results to save a relationship before it turns sour. If a customer who has normally been very positive submits a neutral survey, prioritize that customer. You might need to add him to an outbound campaign or route him differently the next time he calls in. The opportunities to customize the customer's journey are endless when you have all the information in one spot.



## USING SURVEY RESULTS TO IDENTIFY TRENDS

Survey results can tell a business information about trends with individual customers and with certain products or services. For example, let's look at your customers with questions about a new charge on their bill. Some start by tweeting their questions, and others open up a web chat with you; both groups end up on the phone to rectify the issue and both complete surveys after the interaction. If one group is showing lukewarm and the other is showing positive, then you know you have a break in your process and need to fix that.



A woman with long dark hair and glasses is looking down at a smartphone she is holding in her right hand. She is sitting at a desk in what appears to be a computer lab or office, with several computer monitors visible in the background. The image is in grayscale and has a dark, semi-transparent overlay.

# IMPROVING CUSTOMER LIFETIME VALUE

They say that knowledge is power, and when you know your customer, you have the power to offer the right products and services to them, which will increase the customer lifetime value.

Companies that use a context engine to gather, store, analyze, and use customer information certainly have an advantage over businesses that don't. A context engine like VHT Navigator makes it simple for you keep track of your customers' activities and preferences and identify ways to expand your footprint in their lives by offering targeted messages and personalized offers through upselling and cross-selling.

Personalized offers benefit both the customer and the company. A company can offer a more profitable product or service (such as a new movie channel) while also exposing the customer to a service they didn't know existed (maybe even as simple as setting default communication methods). Timing is key to offering personalized offers, of course, so your context engine can help you identify the best times to upsell or cross-sell a service or simply initiate a "check-in" with a customer.

Sometimes it's really simple. For example, if your customer prefers to pay his bill over the phone each month, automate that service with a scheduled callback. If your customer buys movies on-demand regularly, perhaps offer that customer a new movie channel free for six months.

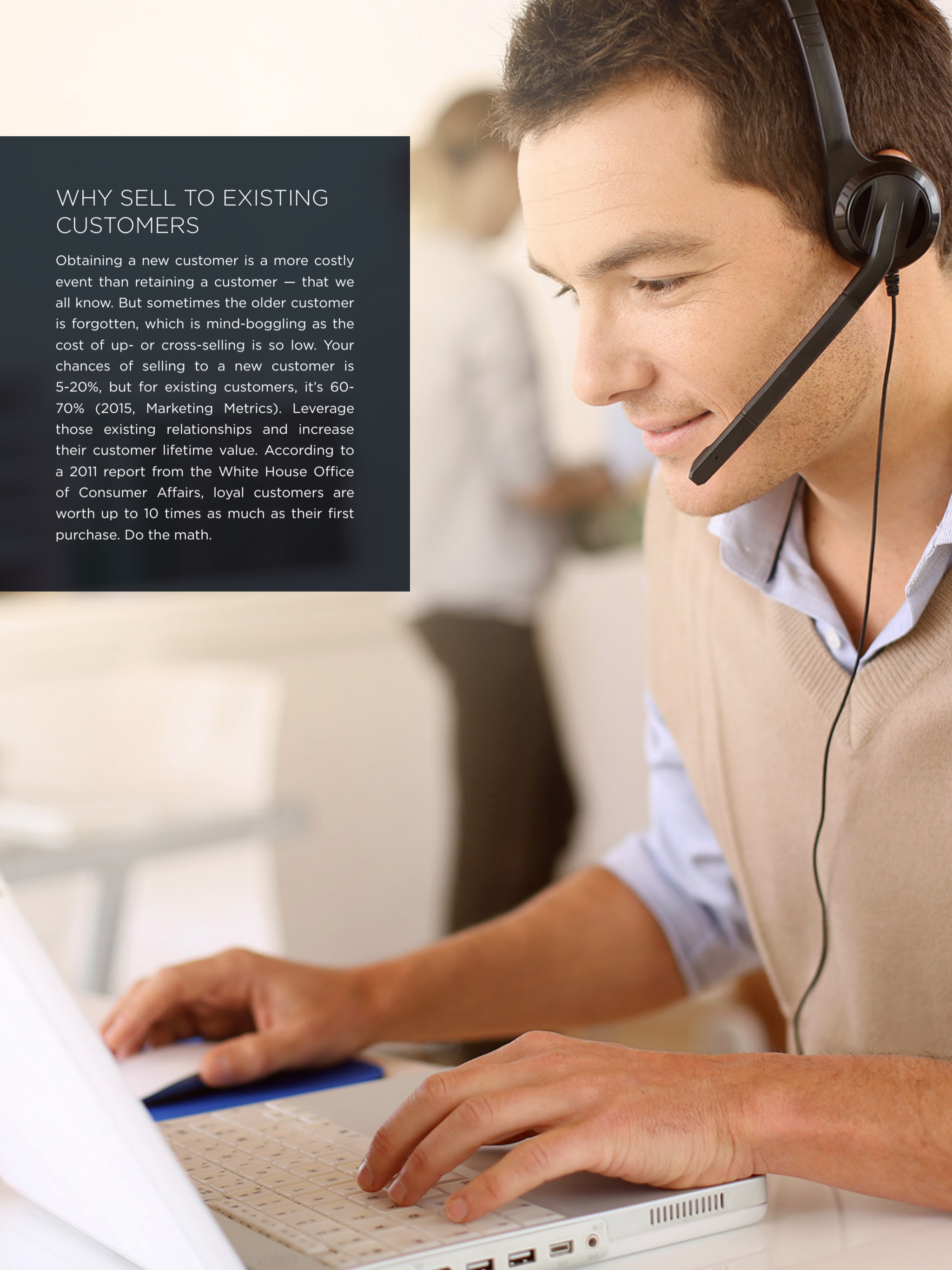
When done right, targeted marketing messages enable a business to meet a need the customer didn't even know he or she had!





## WHY SELL TO EXISTING CUSTOMERS

Obtaining a new customer is a more costly event than retaining a customer — that we all know. But sometimes the older customer is forgotten, which is mind-boggling as the cost of up- or cross-selling is so low. Your chances of selling to a new customer is 5-20%, but for existing customers, it's 60-70% (2015, Marketing Metrics). Leverage those existing relationships and increase their customer lifetime value. According to a 2011 report from the White House Office of Consumer Affairs, loyal customers are worth up to 10 times as much as their first purchase. Do the math.





Customer interactions don't happen in a vacuum, but it might appear that way to our customers. When we silo business units, we fail to present a united front to our customers, which only frustrates them — and makes them wonder who they're doing business with. Beyond that, siloing your customer's experiences with your company puts you at a disadvantage. If you don't know your customer's entire journey with your company, how can you create meaningful relationships, provide great customer service and establish a long partnership with your customer? It's simple: You can't. When you take the necessary steps to use the information you already have, then you're able to nurture your relationship and build your business. Don't waste the opportunity.





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