7 PRINCIPLES of A WINNING CUSTOMER EXPERIENCE
INTRODUCTION

By 2020, customer experience will overtake price and product to become the key differentiator between B2B brands. With that milestone fast approaching, delivering the experience customers want requires close listening and coordination across your organization.

At Salesforce, we constantly seek feedback from our customers to improve their experience and drive their success. We want to know what customers expect from our products, how they use them, and how we can better serve their needs. Over the course of one year, we performed more than 6,000 surveys, 1,000 one-on-one customer engagements, and 18 focus groups and research studies. This research gives us valuable insights that help us better understand our customers.

We’ve identified seven elements of customer experience that, when applied holistically and consistently, allow businesses to create an experience that will set them apart, today and tomorrow. Now, we’re sharing these insights to help you deliver the experiences your customers want.

Top 7 Principles of Customer Experience
1. Understand How Customers Define “Success”
2. Prioritize Product Fit From the Beginning
3. Make Finding Help Easy
4. Invest in a Successful Start
5. Provide Ongoing, Tailored Guidance
6. Show How Similar Customers Succeed
7. Drive Continuity Across Interactions

84% say the experience a company provides is as important as its products and services – up from 80% in 2018.1


7 PRINCIPLES OF A WINNING CUSTOMER EXPERIENCE

#1: UNDERSTAND how CUSTOMERS DEFINE “SUCCESS”

Knowing your customers is the first step in delivering a great experience. To help your customers be successful, you have to understand how they measure value and align to their goals. This is the true aim of customer-driven companies.

84% of customers say that being treated like a person, not a number, is very important to winning their business.3

What We’ve Learned

To truly know their customers, organizations need the right customer data. They also need tools and processes for capturing, documenting, and mining that data. This is no easy feat, but with the right technology, businesses can achieve a 360-degree view of every customer.

For instance, Salesforce gives its employees access to the same data in real time. This visibility drives alignment on key customer goals. While there’s no replacement for individual customer conversations, companies can scale these learnings using analytics and segmentation, tailoring experiences across industries, use cases, and levels of expertise.

Customer success is one of Salesforce’s four core values. Our Customer Success Group (CSG) is an entire organization dedicated to helping customers reach their goals. Whether customers want to start right, use Salesforce more effectively, or transform their business, we provide a path at every step of their journey. With always-on resources, adoption programs, and services, we ensure that every type of customer achieves business value, faster.

“Everything we do in this organization—whether it be in the Success world, the Services world, the Support world, or the Renewals world—is about driving success for our customer base. And we need to ‘show up’ the way our customers want us to ‘show up’.”

Brian Millham
President, Global Customer Success

#2: PRIORITIZE PRODUCT FIT from the BEGINNING

B2B customers expect the companies they buy from to be their true business partners. They want companies to work with them to determine which products and features are best suited for their short- and long-term goals. This requires a deep knowledge of their own products or services and an accurate understanding of the customer.

Customers also expect companies to help them make good use of what they’ve purchased after the sale. Customers need resources to show them how to leverage the tools at their disposal. When customers know they’re maximizing the value of their current products or services, they’re more open to expanding their relationship with companies.

“Delivering value for my customers really stems from investing up front in understanding their immediate needs and long-term goals. Otherwise, I cannot equip my customers with the right resources at each step of their Salesforce journey.”

Alexandra Wentzell
Product Solutions Advisor

Accounts with high adoption rates are 33% more likely to renew, compared to those with low adoption rates.⁴

What We’ve Learned

Companies must be able to articulate clear, differentiated value propositions for each of their offerings. Employees who interact with customers need to understand the use cases for their products or services. They also must be able to assess a customer’s current and future needs as their business grows and matures.

To determine which mix of Salesforce solutions are the best fit for our customers, Salesforce account teams dig deep to uncover the “why” behind customer objectives. After the sale, Salesforce Success Managers help customers leverage specific product features to maximize the value of the platform.

⁴ Based on comparisons in renewals for Salesforce customers with high versus low license utilization and login percentages.
The first question or challenge a new customer faces can feel like a step backward. As such, businesses should minimize the time and effort required to seek answers or find help. Quick access to support reassures customers that they’ve made a good investment.

Customers want every interaction to be as straightforward as possible. They expect resources to be well-organized and intuitive. They want their point of contact to be responsive. They need easy-to-log support cases that are routed to the right person the first time. And if anything goes wrong, they want to feel confident they’re in good hands.

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**Customer effort and satisfaction are strongly correlated.**

98% of customers who say their technical support experience is “low effort” also provide high ratings for their overall satisfaction.5

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**What We’ve Learned**

Companies must be thoughtful and deliberate when designing customer experiences, intentionally reducing customer effort by streamlining processes and documentation. Before building out complex programs aimed at predicting future needs, companies should fully develop the basics, like robust search features.

To improve our support experience, Salesforce recently introduced Ask Blaze, an intelligent chatbot designed to help customers quickly resolve login issues or reset a password. With Ask Blaze, customers can receive immediate assistance rather than needing to log a traditional support ticket.

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5 Based on an analysis of approximately 100,000 Salesforce Technical Support CSAT Survey responses from February 2018 to August 2019.

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“Customers don’t have a lot of time. Let’s be honest—no one really wants to take extra time out of their day to log support cases instead of doing their jobs. Having accurate information delivered as fast as possible is the key driver of a meaningful experience.”

Venk Chandran
Sr. Director, CSG Product Management
#4: INVEST in a SUCCESSFUL START

Customers rely on the companies they buy from to set them up for success. This means setting accurate expectations about the time, effort, skills, and costs required to implement their products or services. An honest assessment helps customers be better prepared, increasing trust and decreasing their time to value.

Customers also expect to be educated about common challenges up front. Companies generate goodwill when they are transparent about potential obstacles and proactively share best practices.

Customers who are satisfied with their experience getting started with Salesforce are **15 times** more likely to say they have a positive overall experience, compared to those who are not satisfied.6

What We’ve Learned

Companies must invest in programs that nurture customer success from day one. At Salesforce, we offer onboarding resources tailored to customer goals and experience levels, and we deliver them directly within the application the customer is using. We also guide customers and help them avoid common pitfalls by preconfiguring common features and providing role-based checklists.

Of course, there are times when customers need additional guidance or support. Salesforce Customer Success prioritizes hands-on help for new customers who have questions or require assistance.

“We know that customers who are up and running in the first 90 days are five times more likely to renew. So we have to get it right from day one.”

Jamie Domenici  
SVP, CSG Adoption & Growth

New customers are twice as likely to request one-on-one help than customers who have used Salesforce for at least one year.

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6 Based on an analysis of approximately 2,600 Salesforce Customer Success Survey responses from August 2018 to August 2019.
Customers want guidance and best practices tailored to their specific situation over the lifetime of their relationship with a company. They expect companies to know where they are on their journey and to recommend the best next steps toward achieving their goals.

Companies must simplify how they package and deliver this content. They need to use messaging that is relevant, clear, and actionable.

According to Salesforce research, new customers more frequently request product training and “how-tos.” After year one, customers are more likely to request use-case examples and best practices.⁷

What We’ve Learned

There’s no universal path to success, but companies can use segmentation to create step-by-step guidance tailored to specific use cases and experience levels. By offering targeted guidance in smaller portions, companies allow customers to mix and match resources as needed.

At Salesforce, we’re evolving our approach to meet individual customer needs at scale. Using our proven Compass methodology, we’re rolling out Success Paths for all customers. These paths define clear next steps and recommend relevant resources to help customers achieve their goals and drive business value. By standardizing our approach and leveraging our own technologies, we’re able to deliver consistent experiences. We also maintain the flexibility to make adjustments as we measure customers’ progress toward their goals.

“We’re looking at every single customer and assessing their size, industry, product usage, life cycle, et cetera. Based on that information and using artificial intelligence, we’re able to provide proactive recommendations to our success teams so they can support the right interventions with the right resources at the right time.”

Simon Short
EVP, Global Customer Success

⁷ Based on analysis of approximately 5,200 Salesforce Customer Success Survey responses from October 2017 to April 2019.
Success is part instruction and part inspiration. Customers look for real-world examples to see how like-minded companies succeed and to help them stay motivated. When they hear success stories that match their industry or use case, customers can create their own vision of the future and, ultimately, maximize business value.

90% of customers say that engaging in the Trailblazer Community helps them discover and innovate with new Salesforce products and solutions. 80% of customers say the Community improves their ability to adopt new Salesforce features, making them more productive.  

What We’ve Learned

Companies can develop true customer success ecosystems by creating opportunities for customers to guide each other. By facilitating how customers share knowledge and best practices, businesses can accelerate a customer’s growth.

Salesforce has found success by creating the Trailblazer Community, where customers come together to ask and answer questions, share best practices, and collaborate on challenges. Salesforce Community Groups provide opportunities for customers in the same city or industry to come together. Customers connect either online or in-person to share their learnings. Salesforce also hosts Circles of Success, which are small-group, consultative clinics on specific adoption-related topics.

“The Trailblazer Community helps me succeed by understanding new ideas and innovations, solving technical issues, and discovering new ways of working—all the ways the ‘art of Salesforce’ is possible.”

Michael Lupino
Salesforce Governance Expert & Community Group User

Based on analysis of approximately 650 responses to a Trailblazer Community survey in May 2019.
Throughout the lifecycle, customers engage with multiple teams and departments at a company. This exposes them to many people and processes along the way. Customers presume that these teams share information and relevant details. They expect a unified experience throughout their journey, regardless of a company’s internal complexity.

**What We’ve Learned**

To align on customer goals and strategies across all touchpoints, companies need rigorous processes in place to ensure that critical customer information is shared across the organization.

Proper documentation is key. At Salesforce, we believe, “If it’s not in Salesforce, it doesn’t exist.” Using Salesforce as our source of truth ensures that all teams are equipped with the information necessary to drive continuity across interactions and reduce customer effort.

This seventh principle is perhaps the most challenging because it cannot be addressed in isolation. All six previous principles are foundational to create a unified experience. Additionally, your company must create a single framework for understanding and segmenting customers throughout their lifecycle in order to deliver end-to-end experiences that inspire customer loyalty. This requires strong leadership, organizational alignment, and the proper tools and technologies.

“The experience that our customers have with us is a collection of every individual interaction they have, whether it’s online or offline, email, on the phone, or in person. We have to ask ourselves, ‘What do we have to do together to transform the company to give our customers exceptional experiences at every moment that matters?’”

Tony Rodoni
EVP, Customer Experience & Salesforce Pledge
Meeting and exceeding customer expectations will be key to setting your business apart in 2020 and beyond. The seven principles addressed here are critical building blocks for winning customer experiences.

Developing a truly customer-centric business is a long and rigorous process, but our research and insights show that it’s the best path to success.

Wherever your business stands on your journey to delivering personalized, seamless customer experiences, we have the resources to help you get there.

Check out these Salesforce Trails to continue your journey.

Customer Journey Basics
Consumer Interaction Management