Contents

72%

of business leaders increased productivity

Custify

How to Communicate Efficiently with Customers
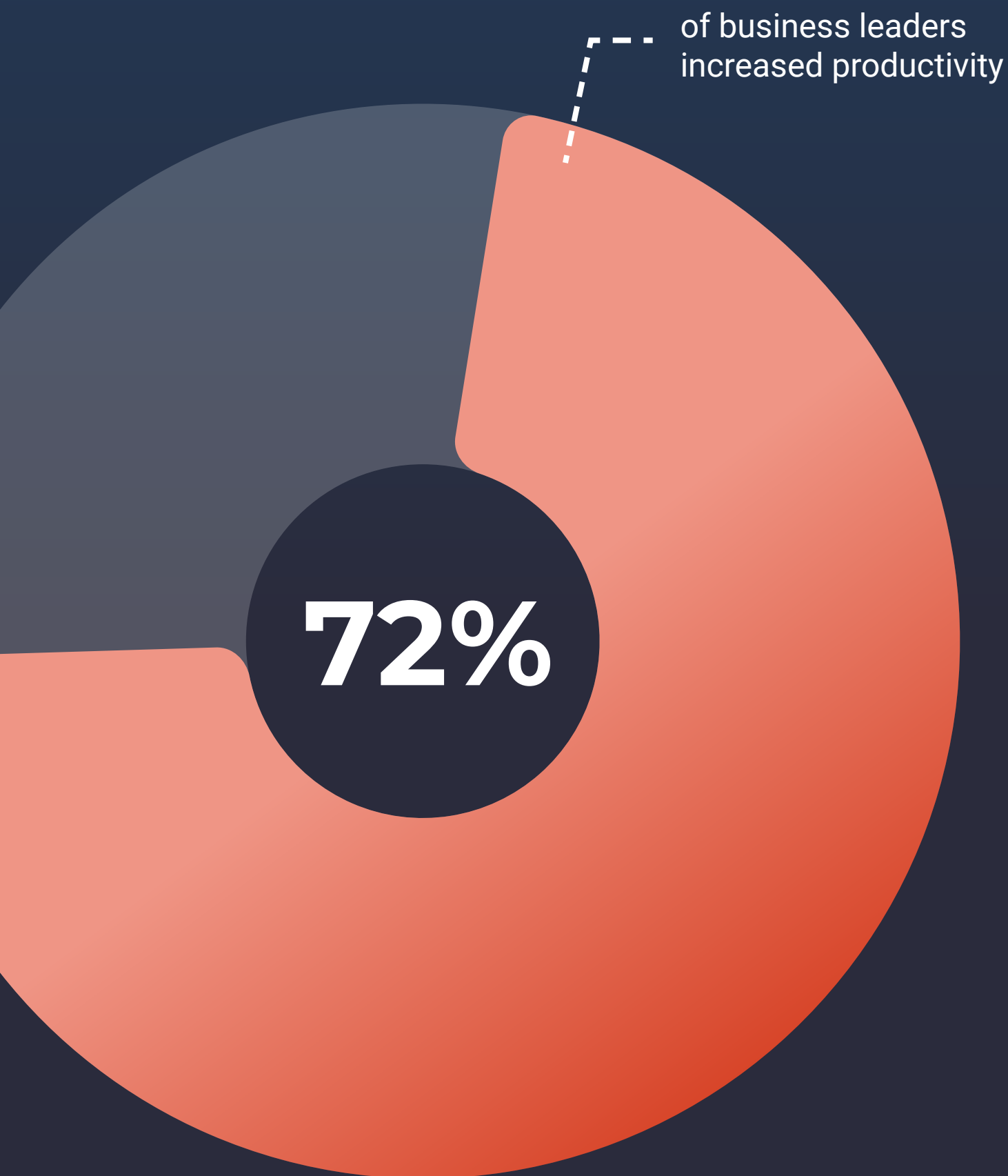
We're sure you'll agree with us on this.

Effective communication is the key component of any successful customer relationship.

In fact, 72% of business leaders believe that effective communication has also increased their team's productivity.

It's not just about conveying information; instead, communication is about building trust, setting expectations, and guiding your customers through their journey with your product or service.

However, despite your best intentions, as businesses scale, making sure all your customer communication is high-quality and personalized can become increasingly difficult to manage.

To help you discover how technology like a customer success platform could help you to overcome these challenges, in this chapter, we're going to delve into some of the key ways your CSMs need to communicate and what options you have to help them with it.

The Role of Communication in CS

As we've just talked about, communication is an essential part of customer success management and the overall success of your customer journey - without it, your customers will become confused, frustrated, and unlikely to stick around.

To avoid this, let's look at some of the outcomes your customer communication needs to achieve.

Building Trust

Trust is the cornerstone of any successful relationship, and it's certainly no different when it comes to a relationship between a CSM and a customer.

Clear and effective communication builds trust by keeping your customers informed, setting clear expectations - and delivering on those expectations. as well as being open and honest about potential challenges or issues.
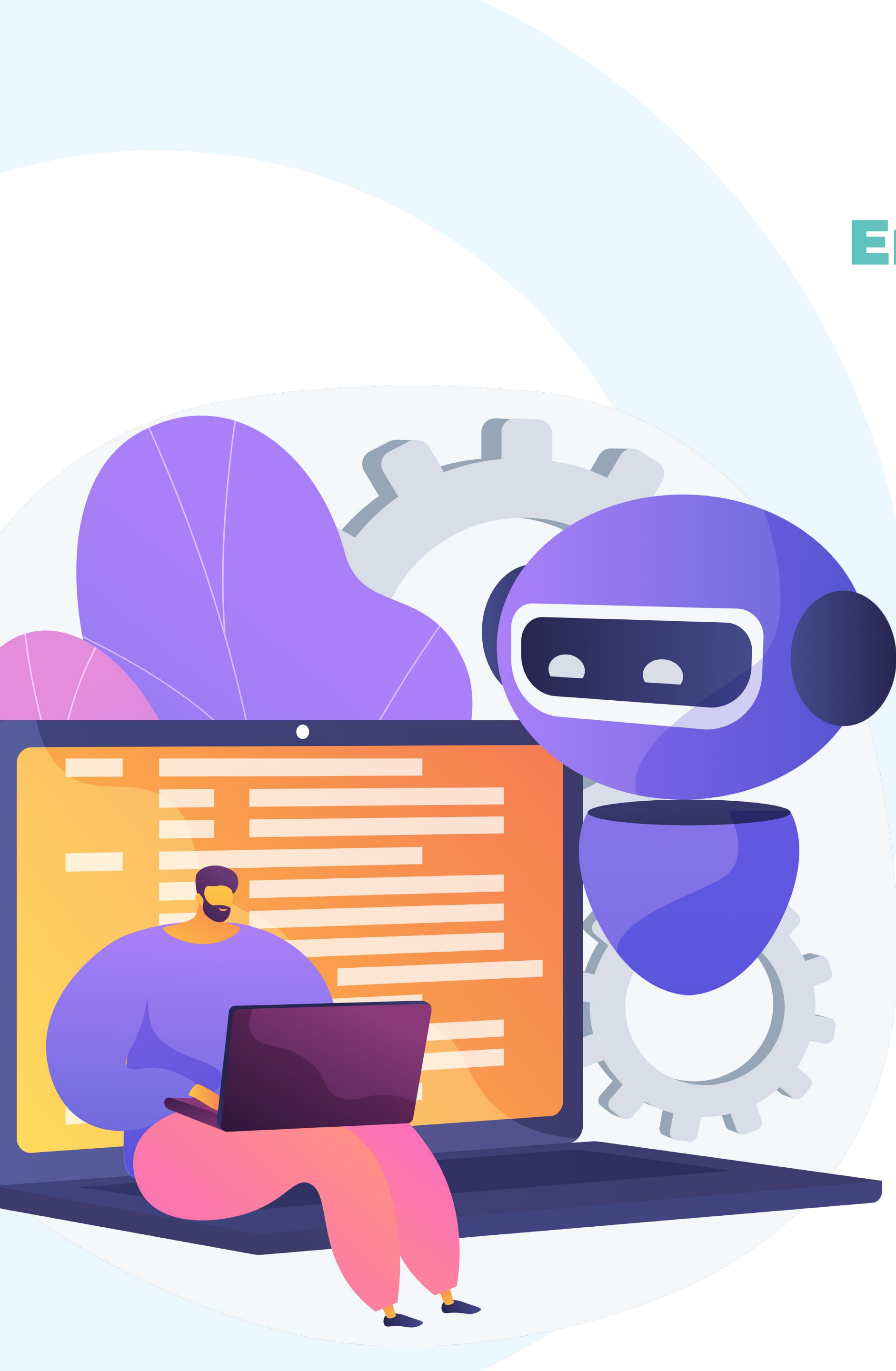
Encouraging Engagement

You can't expect your customers to want to engage with you, if you're not engaging with them.

Engagement is not a one-time or one-way process - it's something you need to do consistently in order to maintain a healthy relationship with your customers.

This means you should be regularly communicating with your customers - both individually and at scale - both about your product in general, as well as their specific needs or use cases.

It's important to note that regularly and consistently doesn't mean you need to speak to them every day or every week -but you should be able to find a suitable cadence of communication based on the size and scale of your customer and the stage they're at in their journey with you.

Putting in the groundwork here and having a well-oiled communication channel with your customers means your customers are more likely to be receptive to opportunities for upsells and cross-sells, as well as being willing to offer feedback or stick with you through any difficult issues.

Problem-Solving and Support

Of course, we all know that customer success isn't customer support.

However, your customers will inevitably have questions for you from time to time, which, in your capacity as a 'trusted advisor,' your CSMs should be prepared to help with.

Instead of bluntly referring your customers to the support team, washing your hands of the issues, and never looking back, you can do things differently.

Working with the customer in a timely, empathetic, and solution-oriented way will help you strengthen your bond with your customer and enhance the relationship.

This doesn't mean you need to personally answer every support request that lands with you, but it does mean you should be prepared to help the customer and oversee the successful resolution of that issue.

Custify

This is the big one - the ultimate outcome of all your hard work as a CSM or CS team.

Without effective communication, your chances of successfully retaining your customers in the long term are almost zero.

When it comes to retention, some factors are completely out of your control as a CSM - including things like market conditions, internal budgets, and personnel changes.

However, ensuring that you are always keeping good lines of communication open with your customers and doing things like:

✓ Identifying and resolving potential issues
✓ Understanding customer needs by actively listening,
✓ Tailoring your products and services to their needs

means that not only will you stand a much better chance of retaining and growing that customer in the long term, but you will also start to turn that customer into an advocate that can help to attract new customers.

Customer Retention

Improving Customer Communication with Technology

OK, so we won't keep going on about how great communication with your customers is. Instead, let's change track and look at how you can leverage the power of CSP technology to transform the way you communicate with your customers.
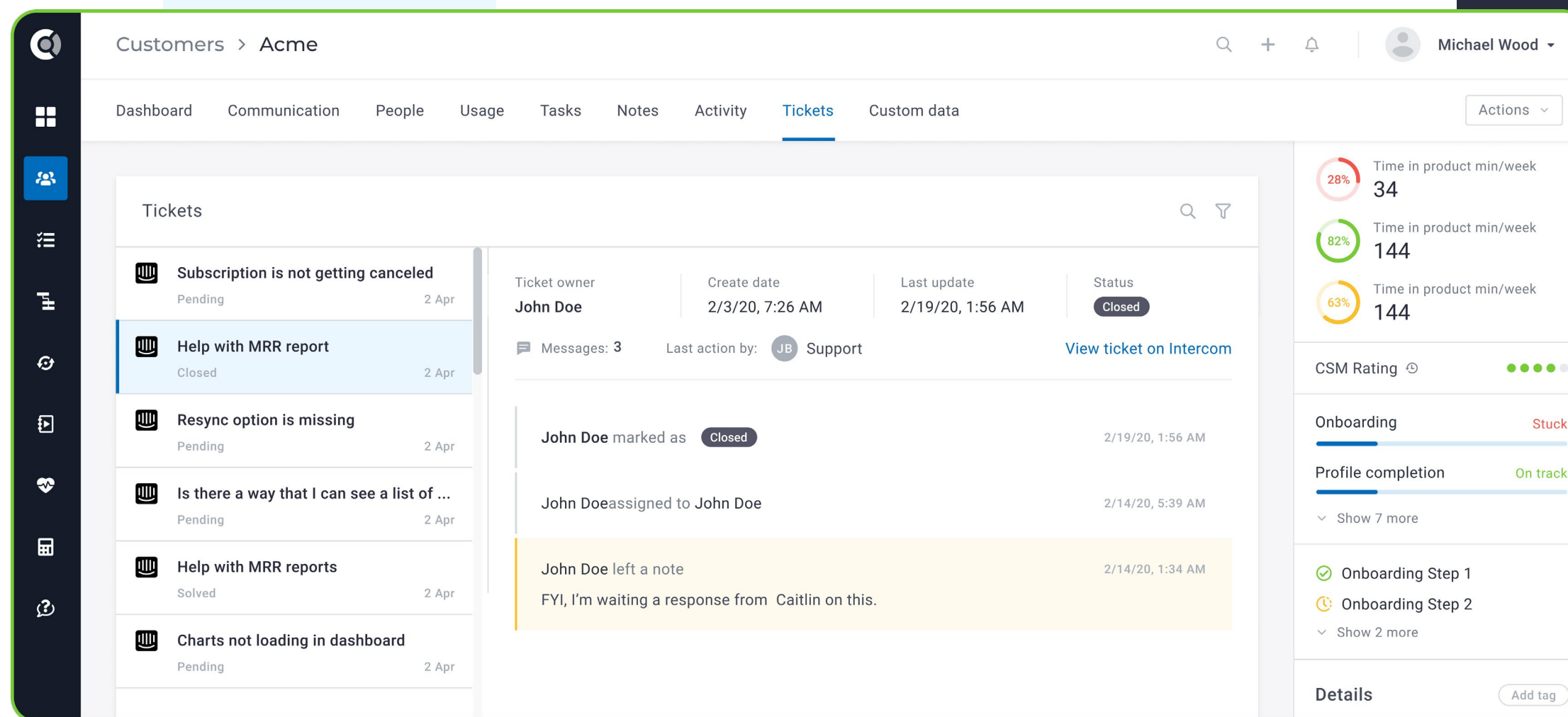
Centralized Communication

Because customer success platforms help to break down data silos by storing all your historic customer-related communication in one place, it gives you huge advantages when it comes to how you communicate with them.

There's nothing worse as a customer than the person you're talking to in a company not knowing about something you've already discussed at length with another member of the team.

CSPs can store all customer emails, sales information, chat messages, support tickets, meeting notes, and more in one place. This means both you and your entire team have access to the same information at the same time.

As a result, the experience for your customers should be completely flawless, with consistent and well-informed communication every time.

Estimated time saved: 3-4 hours per CSM per week.

You don't have to write every email from scratch in order for it to be an effective way to communicate with your customers.

Throughout the customer journey, there are going to be countless common milestones, events, or other reasons to communicate with your customers. These could be things like:

✓ Welcome emails
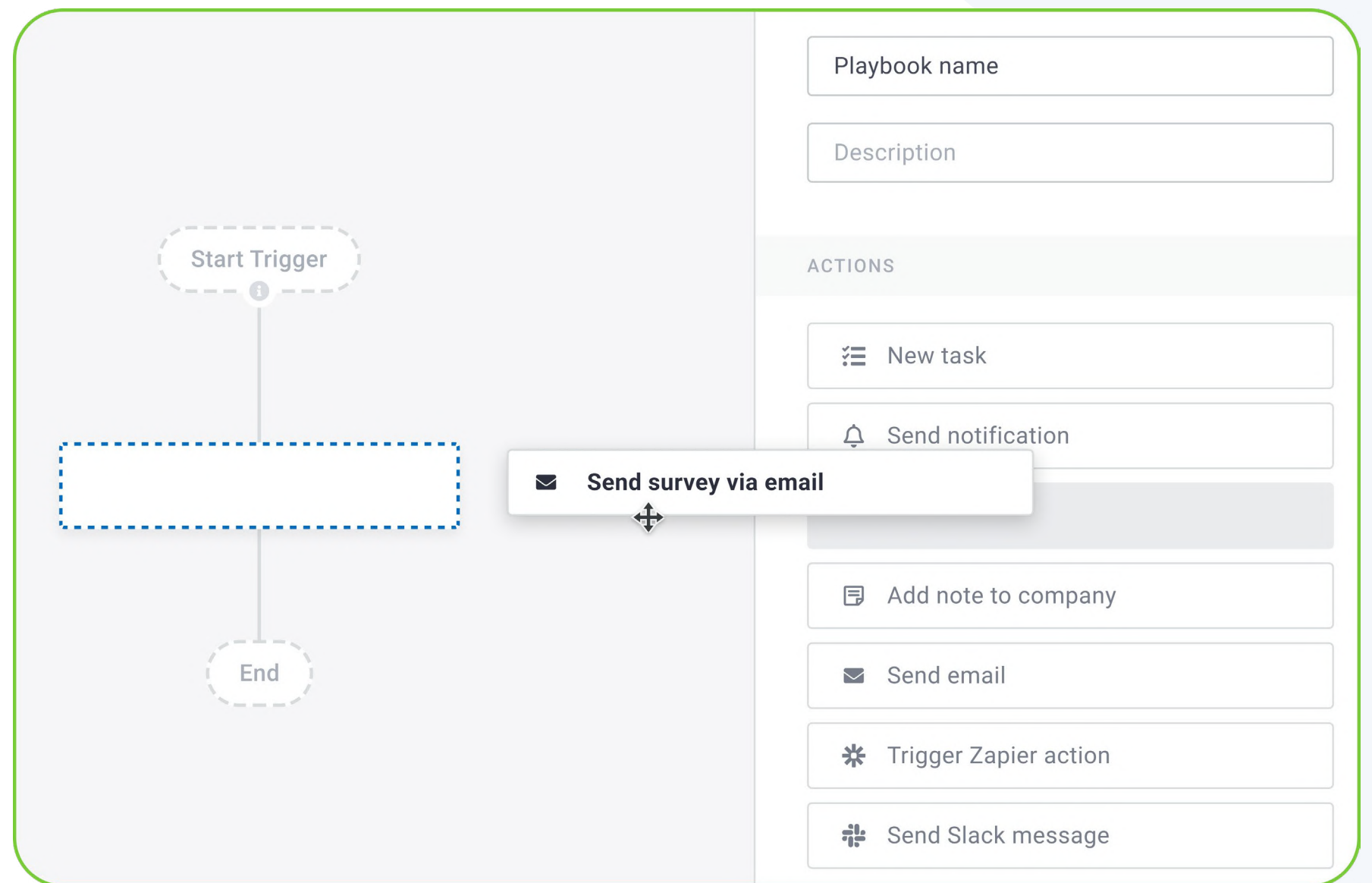✓ Product updates
✓ Renewal reminders
✓ Meeting requests

Using a CSP will allow you to automate these more routine or repeatable messages.

Not only will this save your CSMs precious time, but it will ensure that no customer is ever forgotten about and that the message remains consistent across the board.

Of course, these messages don't have to appear as generic and soulless. You can set a variety of personalization and automation parameters around these messages so that they always feel pertinent and timely to the customer.
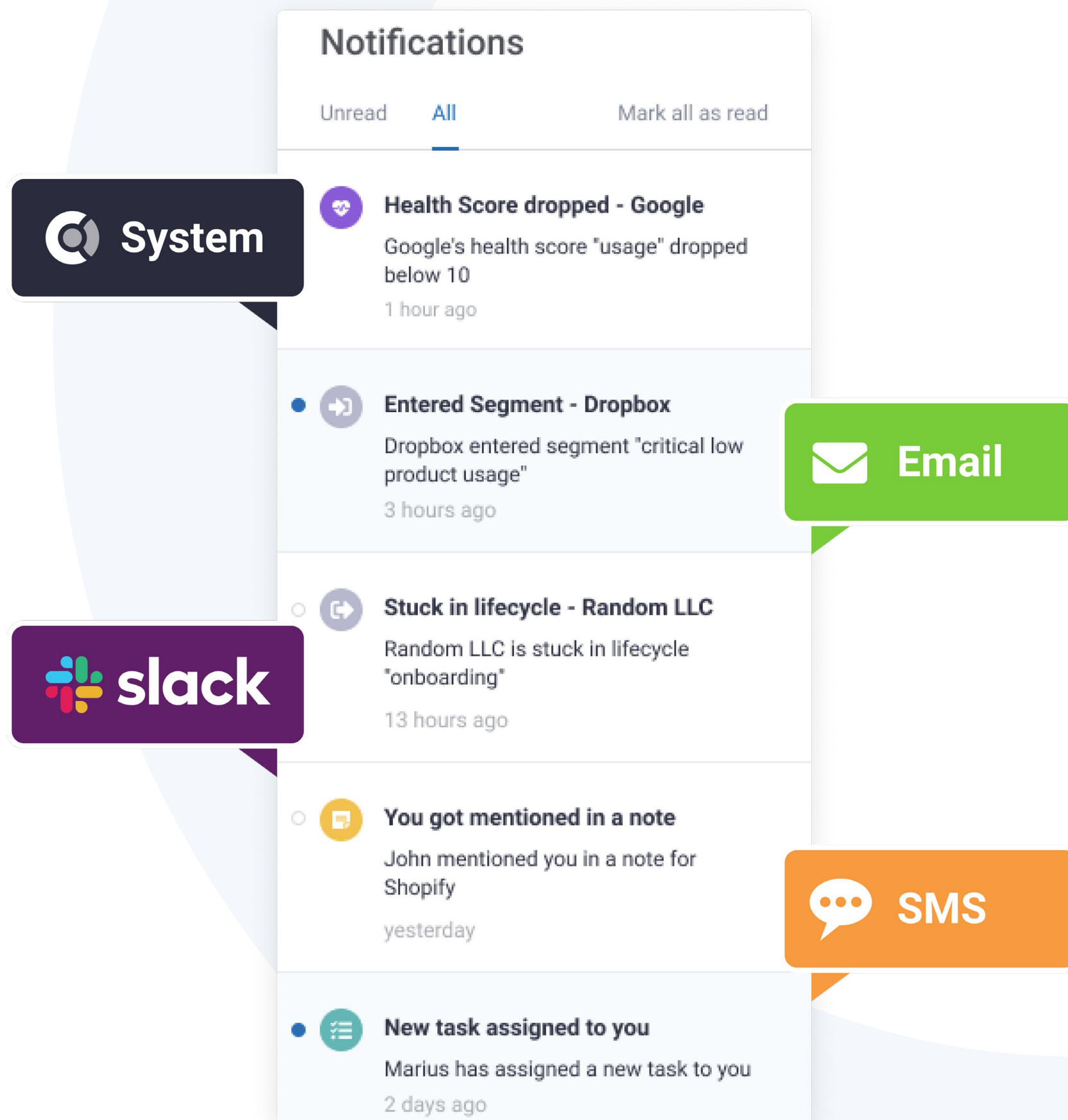
Estimated time saved: 6 hours per CSM per week.

Automated Messaging

Playbook name

Description

ACTIONS

Start Trigger

ⓘ

☰ New task

🔔 Send notification

✉ Send survey via email

✥

📄 Add note to company

✉ Send email

End

✳ Trigger Zapier action

Send Slack message

Jeff Breunsbach - Director, Corporate Marketing @ Higher Logic / Co-Founder @ Gain Grow Retain

Tech isn't a replacement for human touch, but it's a fantastic augment. I've used automation platforms for milestone check-ins and feedback requests. It ensures consistent touchpoints while freeing up time for more meaningful, personalized interactions.

Real-Time Notifications

Custify

Notifications

Unread   **All**   Mark all as read

System

Health Score dropped - Google
Google's health score "usage" dropped below 10
1 hour ago

Entered Segment - Dropbox
Dropbox entered segment "critical low product usage"
3 hours ago

Email

Stuck in lifecycle - Random LLC
Random LLC is stuck in lifecycle "onboarding"
13 hours ago

slack

You got mentioned in a note
John mentioned you in a note for Shopify
yesterday

SMS

New task assigned to you
Marius has assigned a new task to you
2 days ago

They say that knowledge is power - and that forewarned is forearmed.

These old adages are absolutely right, especially when it comes to customer success.

CSMs need as much information at their fingertips as they can get, in order to make sure their customer accounts remain healthy at all times.

By making use of real-time notifications available with a customer success platform, CS teams can quickly learn about any significant changes in their customer's behavior.

These changes could be them starting to use a new feature, submitting a number of support tickets, or even changes in their usage patterns.

By receiving notifications of these events, CSMs can proactively reach out to the customer and offer help and guidance where appropriate to prevent potential issues from occurring.

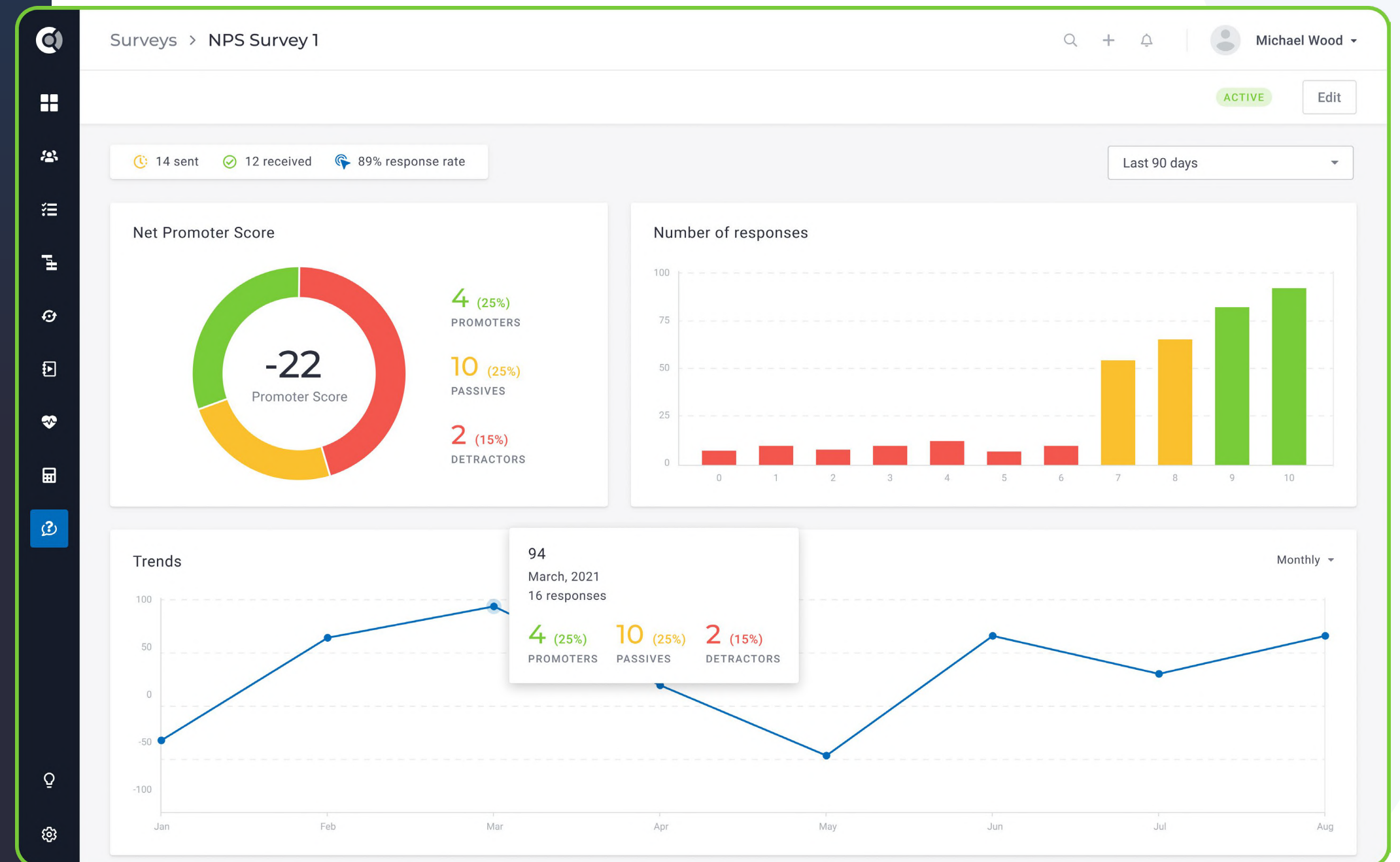**Estimated time saved:** 3-4 hours per CSM per week.

Customer Surveys

Of course, communication shouldn't be a one-way street.

Your customers need a chance to be able to share their thoughts on the product, the service they receive, and how it affects them.

This is where you can leverage in-built customer survey tools within your customer success platform, to automatically collect Net Promoter Score (NPS) or Customer Satisfaction (CSAT) survey data from your customers

By gathering this information at points that make sense in your customer journey, you'll be able to produce insights into your customer's overall experience so far, and make the appropriate intervention to help improve things where necessary.

Estimated time saved: 2 hours per CSM per week.

360 Customer View
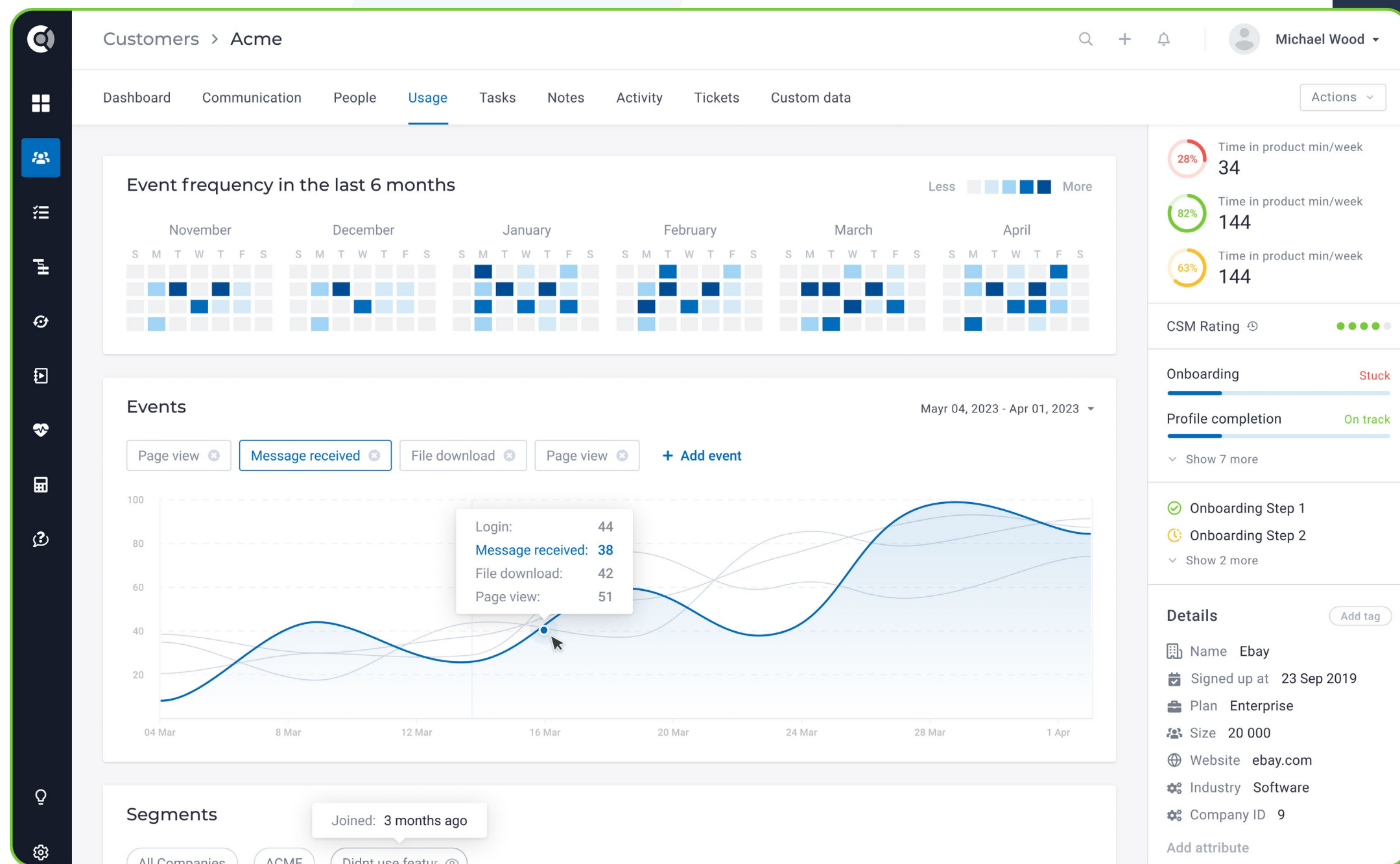
Clearly, it's very important to be able to intervene when customers are facing issues, but the best CSMs should be able to work proactively before the customer is even aware they have an issue.

One way they can do this is by using a 360-degree customer view within their customer success platform.

This will give them up-to-the-minute insights into any number of indicators including:

✓ Product Usage
✓ Product adoption
✓ Health scores
✓ Where they are in the customer lifecycle
✓ Specific success metrics for your product

This information can then be used to automatically trigger a playbook of actions for your CSMs to follow. In some cases, the actions will be further automated - for example, a check-in email - in other more serious circumstances, the CSM may wish to follow up in person.

Either way, having access to a 360-degree view of the customer gives you and your CS team a plethora of options for enhancing your customer communication.

Estimated time saved: 5 hours per CSM per week.

Summary Sheet

Your 'At a Glance' Guide to Improving Customer Communication.

The old manual way versus the modern system, automated and backed up by a CSP software.

Manual Process

❌ Fragmented communication

❌ Labour-intensive messaging

❌ Reactive issue response

❌ Asking customers for feedback

❌ Using data from multiple systems

Versus a CSP where:

✅ Centralized Communication

✅ Automated Messaging

✅ Real-Time Notifications

✅ Customer Surveys

✅ 360 Customer View

Time Saved

3-4 hours per week

6 hours per week

3-4 hours per week

2 hours per week

5 hours per week

Conclusion

Communicating effectively with your customers is a critical part of maintaining a good relationship and avoiding churn. However, with CSMs expected to be ever more efficient with their time and deliver against both revenue and retention targets, sometimes communication can suffer as a result.

We outlined the biggest issues your CSMs will face when it comes to customer communication:

- ✓ Fragmented communication across multiple channels.
- ✓ Labour-intensive, repetitive, messaging.
- ✓ Not being able to respond proactively due to poor data flow.
- ✓ Not having an automated process for collecting customer feedback.
- ✓ Wasting precious time sourcing data from multiple sources.

To counteract these all-too-common customer communication issues, we discussed why you should **consider a customer success platform (CSP) to help improve** your customer communication processes.

Custify

Conclusion

Philipp Wolf, Founder & CEO - Custify

"

As the person steering the ship at a company that's all about championing Customer Success Platforms (CSP) like Custify. Let me share a little secret with you: our platform can give your CSMs back a whopping 20+ hours each week. That's a lot of extra time for those heart-to-heart chats with customers, don't you think?

We make this happen by putting all customer chats in one place, automating those routine messages, keeping you in the loop with real-time alerts, and getting customer feedback without breaking a sweat.

And the cherry on top? A dashboard that brings all your customer data together for a 360 view. If keeping up with customer chats feels like juggling, a CSP like Custify could just be the game-changer you need to make every interaction count.

Custify

Ever dreamt of a solution that tackles every customer communication challenge, boosts product adoption, cuts down churn, and uncovers upsell opportunities, all through a single, straightforward platform?

Custify equips your customer success team with an arsenal for smarter CS operations, offering:

✓ **Enhanced CX & Reduced Churn:**
Refine communication to elevate customer experience.

✓ **Real-Time Management:**
Engage with customers proactively at every turn.

✓ **Centralized Data:**
All customer info, one location for the entire team.

✓ **Actionable Tasks:**
Clear next steps to keep customer journeys on track.

✓ **Health Insights:**
Quick health checks for timely interventions.

✓ **Predictive Analytics:**
Understand past actions and foresee future trends.

✓ **Seamless Integration:**
Merge Custify seamlessly with your favorite tools.

See how Custify can help you improve customer communication:

With Custify, you're not just adopting a platform; you're revolutionizing how customer success is done.

Request a Demo

FAQs

Q: **How can you automate customer communication?**

There are a few key ways that you can add automation to the way you communicate with customers, these include; using scheduling assistants to effortlessly arrange meetings, integrating data to build a 360-view of your customer, and setting up automated messaging based on actions, milestones, or events.

Q: **What are common customer communication issues?**

Some of the common issues that Customer Success Managers (CSMs) can face with customer communication include; fragmented conversations across several channels, wasting time on repetitive messaging, and responding reactively instead of being proactive because their data is difficult to access or out of date.

Q: **What role does data play in customer communication?**

By having instant access to the right data about your customers it means that your CSMs can not only communicate more accurately and more efficiently, but it also allows them to add more value to each and every message that is sent to a customer.

Q: **How can adopting technology, like a Customer Success Platform (CSP), improve communication with customers?**

Adopting a Customer Success Platform (CSP) can help improve the way you communicate with customers by enabling centralized communication, automated messaging, real-time notifications, customer surveys, and 360 data views. All of which help to alleviate repetitive tasks and provide a more consistent approach to customer comms. By leveraging a CSP to improve communications, not only do your CSMs save time, but your customers benefit from a superior experience too.