

BUYER'S GUIDE

What to Look for in a **Customer Experience CRM Platform**

Introduction

Now more than ever, companies are searching for new technology to deliver on customers' growing demands. And yes, they are growing. According to recent Kustomer research:

79% of consumers get frustrated when they can't contact customer service on their preferred medium or platform



76% of consumers expect companies to proactively follow-up if there is a problem with their order



71% of consumers expect their problem to be solved *immediately* upon contacting customer service



85% of consumers would avoid a brand due to bad customer service



Simply put, the modern consumer wants quick and personalized service on every platform, instantaneously. And with customer service ranked as the second most important factor when deciding where to shop, right below price, it is imperative to provide wow-worthy support.

The question becomes, how do you deliver? Without endless resources, providing exceptional customer service can be an intimidating challenge. Luckily, technology can help. This buyer's guide explains what you should be looking for in a customer experience CRM platform, how to evaluate potential partners, and how to measure your success.

Table of Contents

01

A Modern Day
Customer Experience
CRM Platform

03

How to
Measure Success

02

What to
Look for

- Unified Data Environment
- Truly Omnichannel
- Personalized Conversations
- Secure
- Scalable & Efficient
- Insightful

04

The Importance of
Choosing the
Right Solution

05

How We
Stack Up

01

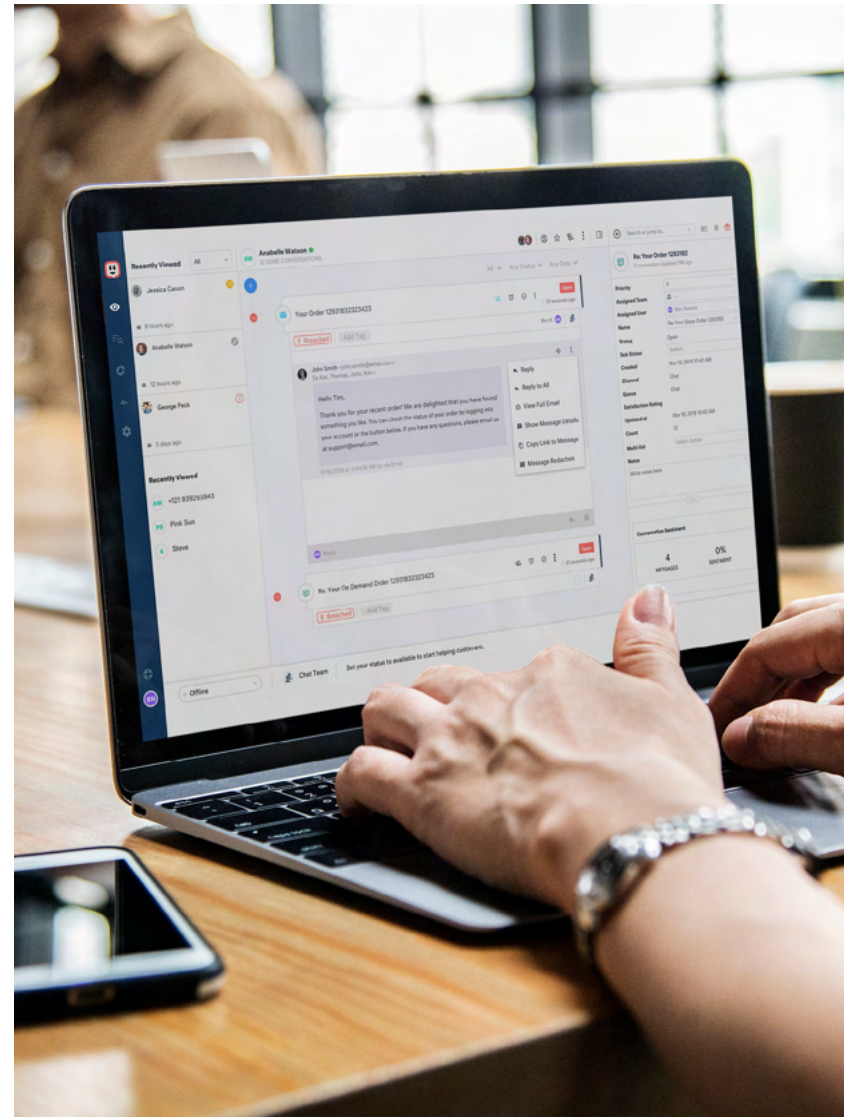
A Modern Day Customer Experience CRM Platform

Think of it this way. Just fifteen years ago, the iPhone didn't exist. Twitter had just been created. And customer experience software wasn't built to accommodate the expectations and channels of today's customers. A modern day customer experience CRM platform treats customers like people, not tickets.

Many customer experience platforms on the market today are ticket-based, meaning they identify the customer as an attribute of an inbound or outbound message and build the communication around that ticket. **These systems prioritize the metric of a "done ticket" over a customer relationship.**

In contrast, modern day customer experience CRM platforms focus on the customer as the center of each interaction. By tying existing applications, business processes, and performance to the experience of the customer, companies are able to deliver more human interactions, as they know the full context and history of that customer and how they've interacted with the brand in the past.

Modern solutions also leverage the newest and most powerful technology to deliver on customer needs instantaneously. Through AI and machine learning, customer service teams don't have to choose between efficiency and effectiveness, but instead can save time and money while simultaneously providing exceptional experiences.



What Makes a Modern Day System



Holistic Customer View

Every customer has a timeline unique to their history of purchases, omnichannel interactions, orders and returns – combining all internal and external data into one actionable view.



Powerful Automation

AI and machine learning enhance agent productivity, deflect low level conversations, and assess the needs of your customers to deliver the best outcome in the shortest time.



Truly Omnichannel

Agents can seamlessly switch engagement channels in real time within the same conversation, easily toggling between channels.



Understands Sentiment

Know how your customers actually feel and gain actionable insights across every support channel and interaction.



Integrated Systems

Fully actionable integrations with any existing system – internal or external. Let your customer service software match your business.



Provides Meaningful Insights

With robust reporting you can understand how individuals and teams are performing, and natively measure CSAT across channels.



Enables Proactive Outreach

Turn your team into a profit center with the ability to segment and bulk message customers, improving retention, building your brand, and reengaging dissatisfied customers.



Easily Accessible

A cloud-based CRM simply requires any internet browser with a standard WiFi connection to access. No downloads. No plugins. No expensive internet plans.



Safe & Secure

With enhanced CRM controls, you can create highly secure permissions that filter conversations, ensuring only specified teams can view your most sensitive information.

Moving from a ticket-based mentality to customer-centric relationship building brings many benefits, and also will take some work. Read through the following criteria to learn what to look for when evaluating potential customer experience CRM platforms.

WHAT TO LOOK FOR

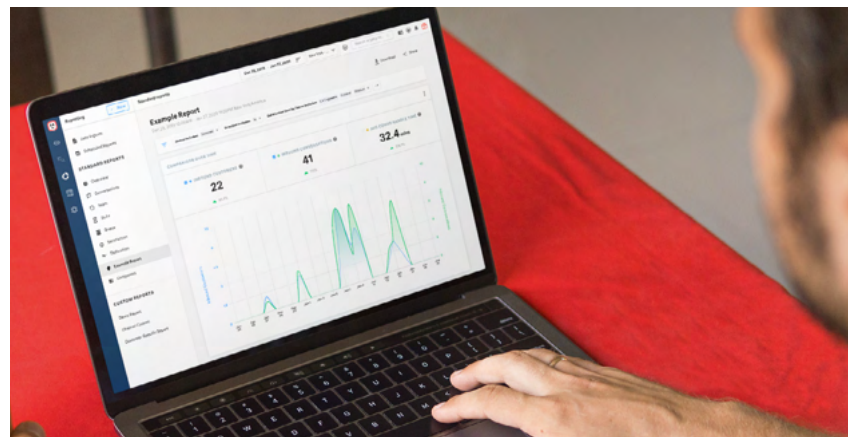
Unified Data Environment

Legacy CRMs were built to manage cases, not customers. That's so 20 years ago. You shouldn't pay more for operational solutions AND modern communication tools in order to provide effective support.

Siloed third-party data means an abundance of wasted time. Agents have to look in a multitude of different systems, on different platforms, just to service a single customer inquiry. Take this retail example:

A customer contacts you asking to return an item. You receive this inquiry and a ticket is created in one system. You might need to look up that customer's order history in another system using their email. Using a third system you might need to create a returns management authorization (RMA) order to return the item. And using a fourth system you might send a message to the person who handles those returns to ask to expedite the order for an important customer.

With unified data in one system, the process would be quick and easy. What if the customer's inbound message automatically brought up their order history, a single button click started an RMA process, created a shipping label and emailed it to the customer, and notified another team to expedite based on the customer's loyalty status? A single and full view of the customer, and an integrated data system, gives you the complete



context of that customer's history so that you can take the right next action.

Look for a platform that is designed to connect seamlessly with your other data sources and business intelligence tools, while taking the place of your support platform, contact center routing software, and process management solution.

You should be able to use the apps you already have and to integrate those applications effortlessly. However, integrating applications is a complicated business and the existence of an integration doesn't guarantee that integration will work with your business. To really integrate, you need to have a system that can handle the inbound information, structure that data in a way that it can be displayed in your system, and make the data available for outbound or reporting use. When integrated properly, you should be able to do powerful things with your data, like segment customers, trigger actions, automate messages and power AI.

WHAT TO LOOK FOR

Truly Omnichannel

The concept of omnichannel customer service has been watered down. It's more than simply communicating with customers on every channel. True omnichannel support ensures seamless transitions and consistent experiences from one channel to the next.

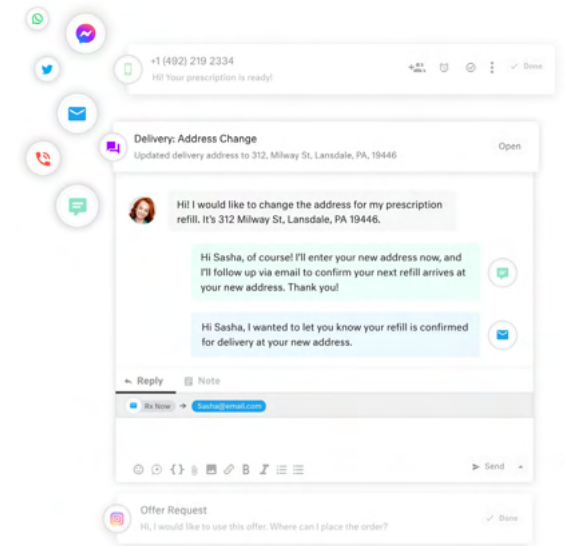
In a multichannel support environment, each channel lives in its own silo with its own dedicated team of agents, with limited communication or sharing of information between channels. Most of the time, when a customer contacts a company, the team manning that channel will create a ticket. If the customer then contacts the company through a different channel about the same issue, a second ticket will be created with each team working their respective tickets. This creates agent collision, inevitably frustrating and confusing customers.

As a result of this fragmented experience, customers will have to take the time to repeat to the second agent what they told the first agent. In addition, multichannel support leads companies to focus on resolving tickets, rather than building stronger customer relationships because agents lack a holistic view of each customer.

Omnichannel support, by comparison, shifts perspective from ticket resolution to customer relationship building. **Customers have the freedom to move between channels throughout their engagement, and are guaranteed consistency, so each conversation starts where**



A best-in-class solution should create a unified home for all your customer data, regardless of the source.



the last ended. Agent collision never occurs when communication channels are integrated, because agents can view the conversation and maintain context even as customers engage through multiple channels. If executed properly, omnichannel support provides a consistent experience for customers at every touchpoint after acquisition. But sharing data between channels takes a technological overhaul.

Look for customer experience software that can integrate your combination of communication channels in order to capture the free flow of conversations across channels and display the data in a single screen. A best-in-class solution should create a unified home for all your customer data, regardless of the source, not only the data generated from customer conversations.

WHAT TO LOOK FOR

Personalized Conversations

Agents have a difficult role. They are the voice of your brand in every customer interaction, yet when they start that interaction they often barely have enough information to authenticate the customer, much less provide differentiated service to every customer.

Many companies are still relying on the old model of customer service, where they treat each new interaction as a separate event handled by different people across a variety of siloed platforms. In this model, there's no way to store, share and track the customer's history and past conversations, so customers are forced to repeat their issue to each new service agent. Repetition comes at a price: according to Kustomer research, 86% of consumers get frustrated when they have to repeat information to customer service agents. Fortunately, the fix is simple: a platform that can collect, organize and streamline customer data so it's all in one place.

To personalize a customer's experience, you have to know the customer — and that requires

data. **A platform that brings all the data about a customer into one place helps customer service agents understand the context of a customer's conversations and helps them deliver more efficient, proactive and relevant service.** There's no need to waste the customer's or agent's time by asking for repeat information. Instead, that information is available at the click of a button, allowing the agent to personalize the customer's experience by giving fine-tuned advice, addressing problems proactively, and suggesting other products or services the customer might enjoy. The result? An efficient but personal interaction that builds a lifelong customer relationship.

Additionally, in the digital-first economy, both businesses and consumers are starting to adopt a new mindset around the role of CX. Support inquiries are now split somewhat evenly across the customer journey, surprisingly with the least percentage of inquiries coming post-transaction. CX teams can now take on more of a revenue-generating

advisory role, answering product questions or directing customers to better alternatives when they can't shop in person. Ensure you have tools in place that can not only delegate busy work to technology, giving your CX agents more time to tackle challenging inquiries, but also surface relevant knowledge base content to your agents so they can confidently take on this new role.

It's also important to look for a platform that powers proactive communication with your customers. When there are fulfillment problems or delays in service, you can get ahead of those issues and prevent an influx in customer outreach. Proactive communication can provide even more value when you use it for actions like reengaging unhappy or complacent customers, and building brand loyalty with targeted offers. Look for a CRM platform that can power bulk messaging, targeting specific customer segments based on your unique data, like orders, location, or CSAT. In no time your customer service team will turn from a cost center into a profit center.

WHAT TO LOOK FOR

Secure

No company ever intends for a security incident to occur, but having the right tools with the right safeguards is imperative. Security is something that requires many layers of protection throughout the application environment. It starts with team policies and procedures and touches continuous security monitoring, tooling and automation built into the software development lifecycle.

Ensure that earning and maintaining trust is a priority for any software solution that you partner with. Robust logging, auditing, monitoring, and data encryption capabilities

should be built into the platform, with industry best practices for security controls and processes throughout the application environment and software development lifecycle. This should include strict endpoint management, extensive employee security awareness training, and comprehensive vulnerability management with regular third-party penetration testing and code reviews.

Additionally, as a trusted system of record, your customer service CRM should provide total control over what every user can see and do in the platform, with full create, read, update

and delete permissioning for all platform functionality. That way you can create highly secure permissions that filter conversations based on customer attributes, ensuring only specified teams can view your most sensitive information.

Be sure to understand any security and compliance regulations that may affect your industry or geography, and ensure that any software partner that you work with is in compliance.

Compliance Cheat Sheet



PCI Compliance

The Payment Card Industry Data Security Standard is an information security standard for organizations that handle branded credit cards from the major card companies.



GDPR Compliance

The General Data Protection Regulation is a regulation in EU law on data protection and privacy for all individual citizens of the European Economic Area. It also addresses the transfer of personal data outside the EEA areas.



SOC2 Compliance

SOC 2 compliance makes sure that systems are set up so they assure security, availability, processing integrity, confidentiality, and privacy of customer data.



HIPAA Compliance

The Health Insurance Portability and Accountability Act created regulations to protect patient privacy in the healthcare industry.



ISO 27001 Compliance

The International Standard on Information Security Management ensures an organization has security policies and controls in place for information and data management.

WHAT TO LOOK FOR

Scalable & Efficient

It would be ideal if you could have unlimited agents working 24 hours a day, seven days a week, 365 days a year to tackle every request that comes your way, but that's rarely possible. Fortunately, most modern customer experience CRM platforms have automation to enable your staff to work more efficiently and focus on the customers who need the most help.

Look for a platform that leverages AI and machine learning to improve the precision and speed of service by automating repetitive, manual tasks as well as your most complex business processes. For instance, high-volume conversation traffic could be intelligently routed to the most appropriate agent, loyal customers could be prioritized, and agents can quickly deliver standardized responses via dynamic content.

With AI, businesses now have the opportunity to provide more self-service opportunities as well, freeing up an agent's time for more complex and proactive support. Chatbots are growing in popularity with both businesses and consumers. They can be used to collect initial information,

provide responses to simple questions, and even complete standard tasks like initiating a return or answering an order status question. While there is always fear of losing personalization when using AI and automation, with the right platform, businesses can actually do the opposite. For instance, if a business leverages customer data properly, chatbots could ask personalized questions based on an individual's purchase or browsing history. These interventions save time for both the customer and agent, and increase the time spent on the actual issue rather than information gathering and low-level support.

Beyond freeing up agent time, AI can also be used to arm support agents with all the information they need to quickly and accurately service their customers. AI support technology can suggest messages to send to customers based on historical conversations and customer attributes, which can become more accurate and personalized over time in conjunction with a machine-learning model.

Look for a platform that leverages chatbots and AI-enabled deflection to act as a first line of defense, optimizing a customer's ability to self-serve so agents can focus on the most important cases and deliver the highest impact. Your solution should have rules and workflow engines that eliminate repetitive tasks and trigger actions, providing your team much needed time and information to resolve difficult conversations quickly. By eliminating manual guesswork and deflecting easy inquiries, the right customer service platform should optimize support volume and empower agents with the tools and insights that drive results



WHAT TO LOOK FOR

Insightful

“ Look for a customer experience CRM platform that provides robust customer reporting and gives you the tools you need to understand your organization more thoroughly.

Being able to measure the performance of your team, understand trends, and adjust your strategy accordingly is imperative for customer service success. Look for a customer experience CRM platform that provides robust customer reporting and gives you the tools you need to understand your organization more thoroughly.

At a high level, information about your organization such as inquiry traffic across all teams, a breakout of which channels are getting the most traffic, and how much time you're spending resolving customer issues, should be surfaced within your solution. However you may want more flexibility depending on how your organization measures success. Look for software that offers custom reporting, with the ability to visualize customer service data as you see fit to best demonstrate success to your stakeholders.

In addition, it's imperative to have a tool that can measure, track, and manage customer satisfaction across all your support channels, directly within your CRM platform. While SLAs and productivity metrics are incredibly valuable when measuring support success, the best indicator comes from customers themselves. Their feedback drives continuous improvement for businesses and their support operations. And while

satisfaction measurement solutions can provide powerful insights, they require additional budget, splinter customer data and agent experiences across multiple systems, and fail to account for the varied communication experiences on each particular channel. Ensure your solution empowers you to monitor topline trends, and drill down into results for specific channels, teams, agents and interactions to identify coaching, content, and policy opportunities that will take your support team to the next level.

A truly flexible platform should also let you export the insights you receive within the software. Whether your organization requires real-time data streams directly to a data warehouse or business intelligence tool for reporting and analysis, or you simply need raw data in CSV format, your customer service software should be able to deliver.

Reporting can also help managers get ahead of issues and plan accordingly. By using predictive analytics, companies can forecast future conversation volume and staffing needs based on historical data. That means agents will avoid fire drills and customers will have quick, convenient and thorough support in their times of need.

03

How to Measure the Success of Your Platform

Unfortunately, measuring the success of a new customer experience CRM platform is often an afterthought for many customer service organizations. But if this measurement isn't set up beforehand you may never know the full impact of the customer experience CRM platform you choose, and whether it is enabling you to reach your goals.

First you should ensure that you have benchmarks in place. Identify the metrics that need improvement and document where you are today, establishing your baseline. While many of the challenges that customer service organizations face are somewhat intangible, try to attach a measurable metric to each challenge. For instance, if agent efficiency is a struggle for your organization, perhaps resolution time would be a good metric to track. Conversely, if effectiveness is a struggle for your team, measuring customer satisfaction metrics like CSAT may be more appropriate.

Next you should set a goal of how drastically you want these metrics to improve, and in what period of time, and socialize with all stakeholders involved. Not only does this give you a guiding light to work towards, but it will allow you to optimize your solution according to those goals. Lastly, once that period of time arrives, be sure to re-measure your metrics and understand thoroughly what improvements have been made.

You should also ensure that there is a strong partnership between your team and your solution provider, so they can assist in not only measuring your success, but also surfacing insights you may not have been measuring yourself (and are hopefully making a positive impact!).

Steps to Measuring Success

- ✓ Identify where you need to improve
- ✓ Establish your baseline
- ✓ Set a goal
- ✓ Socialize with all stakeholders
- ✓ Re-measure success metrics
- ✓ Establish a strong partnership with your solution provider

04

The Importance of Choosing the Right Technology

For better or worse, solving a customer's problem is no longer the only job of a customer service organization. Customer experience is increasingly becoming more important than price and product when it comes to loyalty, and customer service insights are being leveraged beyond the support organization to inform larger business decisions.

Lifelong customers mean a higher lifetime value. Customer service is now the second most important factor in choosing where to shop, right below price, and almost 60% of consumers are willing to pay a premium for exceptional service. Conversely, customers will swear off brands that they think deliver bad customer service, meaning support directly contributes to a businesses' bottom line and should be treated with such importance.

All of this makes finding the perfect customer experience CRM platform imperative. Delivering on growing customer expectations, whether that means personalized and consultative support or true omnichannel experiences, is not optional. Find a solution that is able to deliver on all of the above criteria, and you should be set up for success and rapid business growth.



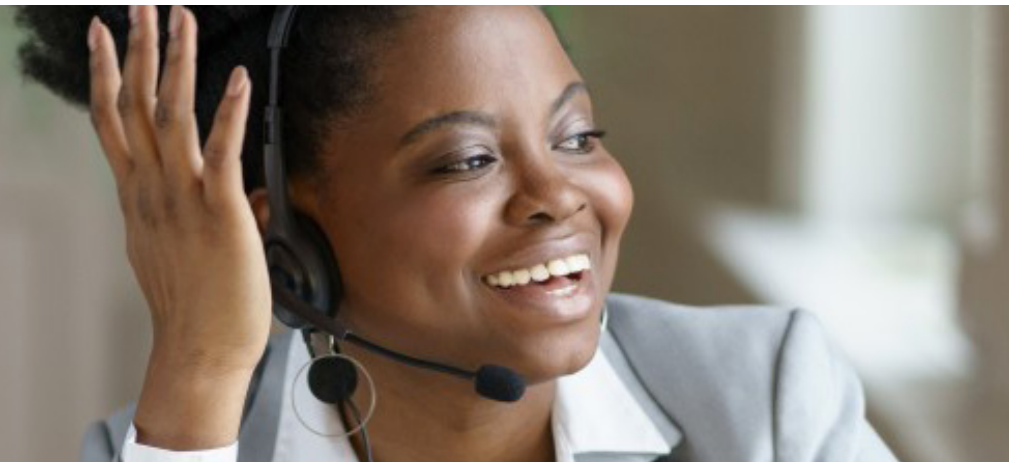
60%

of consumers are willing to pay a premium for exceptional service

I received the wrong item. Can I please exchange? My order number is #287390.

I'm sorry to hear that, Jen! I've gone ahead and processed the exchange. I'm also going to send you an additional 30% off your next order for the inconvenience.

Thank you so much!



05

How We Stack Up

Kustomer vs. Zendesk

	Kustomer	Zendesk
Customer Portal	90%	85%
Chat/Live Support	91%	85%
Email to Case	92%	88%
Voice	89%	82%
Social Monitoring	86%	81%
Knowledge Base	89%	85%
Ticket Collaboration	92%	86%
Internationalization	90%	83%
Customer Profiles	91%	85%
Customer and Contacts Database	91%	83%
Customization	91%	80%
User, Role & Access Management	93%	84%

All satisfaction statistics based on user ratings from [G2® Help Desk Comparison: Kustomer and Zendesk](#)

Kustomer vs. Salesforce Service Cloud

	Kustomer	Salesforce Service Cloud
Ease of Use	88%	80%
Ease of Setup	85%	74%
Workflow	87%	81%
Ticket Collaboration	92%	81%
Customer & Contact Database	91%	83%
Email to Case	92%	85%
Chat/Live Support	91%	79%
Social Integration	86%	80%
Voice	89%	81%
Customization	91%	82%
Integration	91%	80%
Reporting	83%	80%

All satisfaction statistics based on user ratings from [G2® Help Desk Comparison: Kustomer and Salesforce Service Cloud](#)

Kustomer vs. Freshdesk

	Kustomer	Freshdesk
Customer and Contacts Database	91%	80%
Customer Profiles	91%	85%
Simultaneous Multichannel	92%	88%
Transcripts	95%	82%
Multipurpose Engagement	92%	87%
Customization	91%	80%
Integration	91%	82%
Chat/Live Support	91%	85%
Social Integration	86%	82%
Voice	89%	83%
SLA Management	89%	82%
Ticket Collaboration	92%	86%

All satisfaction statistics based on user ratings from [G2® Help Desk Comparison: Kustomer and Freshdesk](#)

Kustomer vs. Oracle

	Kustomer	Oracle
Ease of Use	88%	78%
Ease of Setup	85%	68%
Workflow	87%	83%
Ticket Collaboration	92%	87%
Customer and Contacts Database	91%	81%
Email to Case	92%	89%
Chat/Live Support	91%	82%
Social Integration	86%	68%
Voice	89%	82%
Customization	91%	81%
Integration	91%	77%
Reporting	83%	75%

All satisfaction statistics based on user ratings from [G2® Help Desk Comparison: Kustomer and Oracle](#)

Kustomer vs. Intercom

	Kustomer	Intercom
Meets Requirements	89%	86%
Simultaneous Multichannel	92%	85%
Multipurpose Engagement	92%	87%
Personalization	92%	87%
Knowledge Base	89%	83%
Customization	91%	79%
Integration	91%	86%
Internationalization	90%	80%
Customer Profiles	91%	83%
Voice	89%	77%

All satisfaction statistics based on user ratings from [G2® Help Desk Comparison: Kustomer and Intercom](#)

Kustomer is a top-rated CRM, helping top brands deliver modern customer service that creates customers for life. Through AI-powered automation, Kustomer scales to meet the needs of contact centers and businesses, enabling companies to deliver effortless, consistent and personalized service and support through a single timeline view. Today, Kustomer is the core platform of some of the leading customer service brands like Ring, Glovo, Glossier and Sweetgreen. Headquartered in NYC, Kustomer was founded in 2015 by serial entrepreneurs Brad Birnbaum and Jeremy Suriel, has raised over \$174M in venture funding, and is backed by leading VCs including: Coatue, Tiger Global Management, Battery Ventures, Redpoint Ventures, Cisco Investments, Canaan Partners, Boldstart Ventures and Social Leverage.

To learn how Kustomer can help you provide exceptional customer service, visit [Kustomer.com/Demo](#)

