

7 STEPS TO A PERFECT DATE WITH YOUR CUSTOMERS



How does your business say “I love you” to the most important person in your life: **your customer?**

Presented by G2 Crowd with contributions from

SignNow & *easyvista*[™]

In many ways, a successful relationship with your customers is like a successful romance. They want you to notice little details about them. They love it when you do thoughtful things (especially without any prompting). And if they think you're losing interest, watch out.

When you provide great service, your customers are more likely to return the favor by staying loyal to your brand. Consider these stats:

70 percent of Americans are willing to spend up to 13 percent more to do business with a company that provides great service (American Express 2011 survey).

Boosting customer retention rates by 5 percent increases profits anywhere from 25 percent to a staggering 95 percent (Bain and Company).

82 percent of people have stopped doing business with a company because of a negative experience (Right Now Technologies).

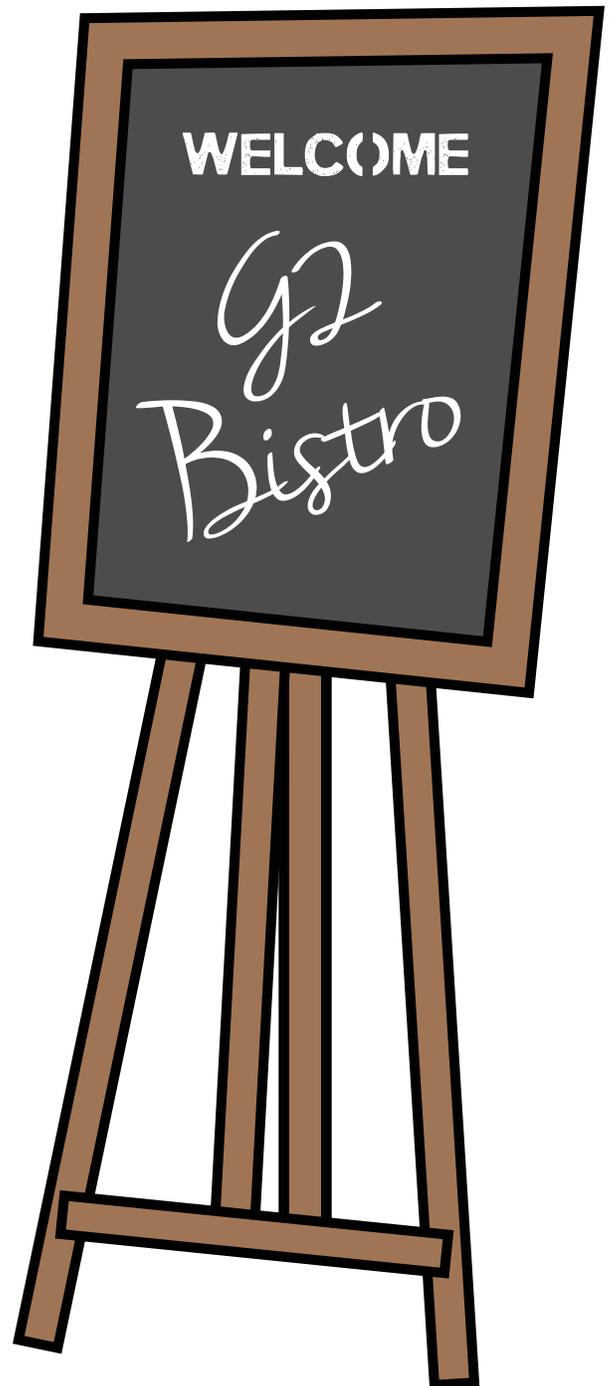
Whether you're making sure a human answers your customers' calls or providing relevant industry tips, the right tools can help you create a stellar client experience every time. So in this season of romance, give your customers a night to remember with our plan for a foolproof date.



THE RESTAURANT:

CUSTOMER RELATIONSHIP MANAGEMENT SOFTWARE

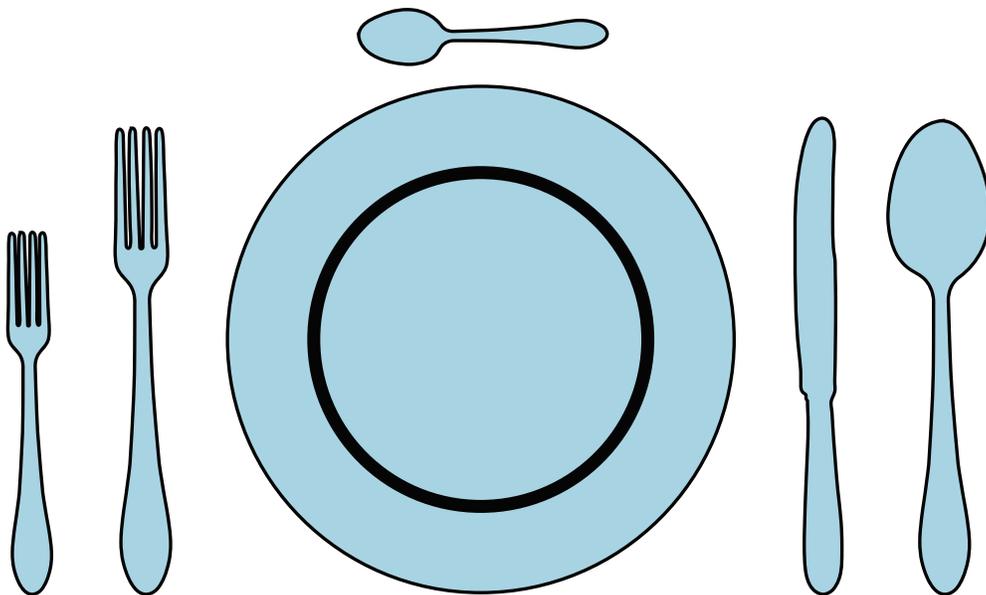
Italian or sushi? Industrial chic or dim and romantic? The restaurant sets the stage for the evening, so put some thought into the impression you're making. Just like restaurants, customer relationship management (CRM) systems come in every style imaginable so you can choose a platform that fits the needs of your business and your clients. A CRM lets you manage the entire customer lifecycle, from lead to order to support, with features that include sales force automation, marketing automation and support case management. That means you'll have details about each customer at your fingertips. After all, no date wants to tell you where she went to school for the third time.



THE DINNER:

CONTENT MARKETING SOFTWARE

They say the way to a man's heart is through his stomach. When it comes to your customers, skip the steak and nourish them with educational content. Whether it's a how-to video or a white paper on a current industry challenge, addressing your customers' real business needs through content will establish you as a thought leader and build trust with your audience. Content marketing tools help you keep everything organized and make it simple to publish across a wide range of channels so you can reach your audience wherever they are. Who saved room for dessert?



THE CHOCOLATE:

BRAND ADVOCACY SOFTWARE



From truffles to conversation hearts, Americans spend about \$1.6 billion on candy each Valentine's Day. To treat your customers, invest in brand advocacy software. These platforms provide a hub for engaging with existing or potential customers, allowing you to reward them for things like sharing your content socially, completing challenges or writing product reviews. Perks for them and enhanced brand identity for you? Sounds like a sweet deal.



THE WINE:

DIGITAL ADVERTISING SOFTWARE



Did you know there are more than 10,000 wine grape varieties in the world? No wonder that restaurant's wine list is so intimidating. With the proliferation of channels today, digital advertising can be just as daunting. Cross-channel advertising software acts like a sommelier, allows you to manage buys across three or more channels, including video, social media and websites. Data management platforms point you in the right direction by analyzing customer data and recommending audience segments based on previous touch points. Put it all together, and like a glass of Pinot, you'll have your customers feeling the buzz.

THE FLOWERS:

HELP DESK SOFTWARE

Red roses mean passion. Yellow tulips mean you're hopelessly in love. So how do you say, "Thanks for your business?" With a great customer service experience.

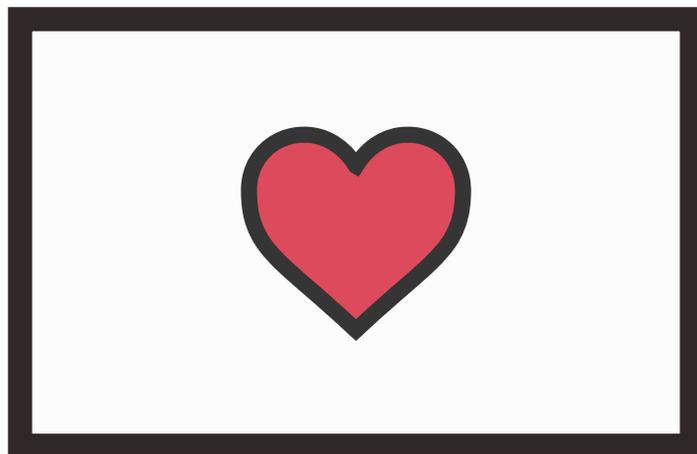
Just like a bouquet of blooms, customers appreciate the thoughtfulness of good service, and help desk software makes it simple. Automate administrative tasks so agents can spend more time with customers, integrate with your CRM to access customer data instantly, and empower customers to answer questions on their own with a knowledge center and Q&A forum features. Your clients will remember how you solved their issues long after those lilies wilt.



THE LOVE LETTER:

CALL TRACKING SOFTWARE

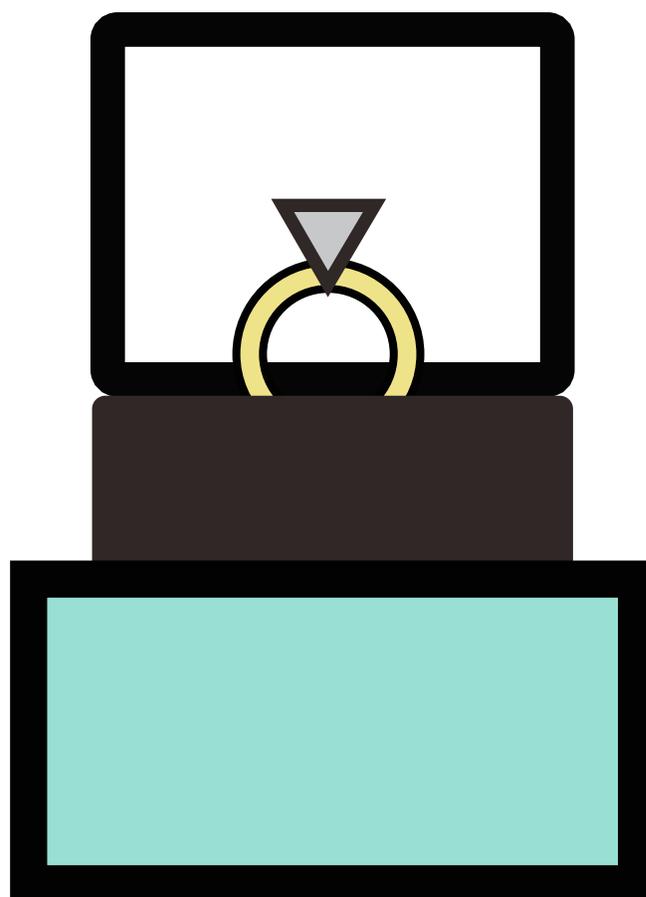
Want to make your date's heart pound? Tell him all the things you love about your relationship: your standing Sunday morning date with a French press and the newspaper, how hard his Conan O'Brien impression makes you laugh, the time he surprised you with Blackhawks playoff tickets. Doing that means paying attention to the details that make your bond unique. For businesses, call tracking software helps you listen to your prospects and respond in a way that shows you're paying attention. Depending on the platform, you can track inbound calls to understand what marketing channels drive action and sales, or use call routing and voice response systems to qualify leads. By taking the pulse of your inbound call campaigns, you can craft a proclamation of love intended just for them.



THE RING:

E-SIGNATURE SOFTWARE

Tonight's the night. You pour the champagne, bend down on one knee and pop open that sky-blue Tiffany box. The sparkling diamond inside is your promise to your partner that she can depend on you. Customers want that same feeling of happily ever after from their businesses. E-signature software gives you a strong foundation of trust, partnership, and dependability to ensure mutual growth.



Remember, customers are like everyone else — we all want to be loved. By prioritizing your customers' needs, your business will benefit in the long run. With tons of available software options, a little research can uncover solutions that will help you connect better with your audience. Find the ones that fit your needs best and set the stage for a blissful long-term relationship.

SignNow explains how, like the ring in a relationship, eSignature software represents trust.

Relationships and E-signature Software Have These 4 Things in Common

In a romantic relationship, the ring is the symbol of a promise. It symbolizes commitment, partnership and a sense of trust between partners. It says “we’re in this together and I trust you”.

Similarly, signing a document carries with it the responsibility to abide by an agreement and treat the other party with respect.

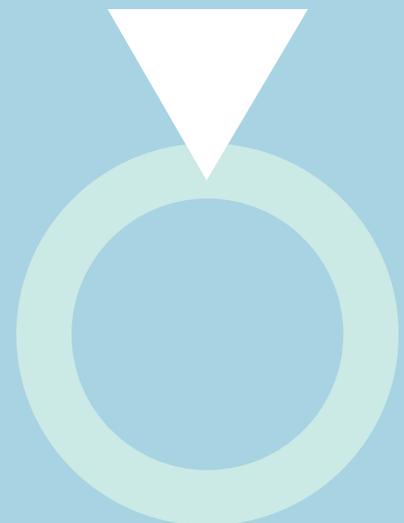
Here are 4 ways that eSignature software offers the same happily ever after as that committed relationship.

A Trusting Commitment

Couples come together to form a partnership, based on a sense of trust and wanting to commit. Without trust, the relationship falls apart. Without a commitment, it's difficult to set the proper expectations.

In business, rarely does someone sign a document without trusting the other party. eSignature software offers that extra level of trust, because there are controls in place to make sure the transaction is secure. There are laws that govern eSignatures, there is encryption and authentication is required.

By definition, signing on that dotted line (even when digital) signifies a commitment of some sort. There are terms to which both parties agree. Expectations are laid out and all parties involved agree to abide by the terms of the document. eSignature software retains a copy of the document in the cloud, for easy reference — no denying that something was agreed to!



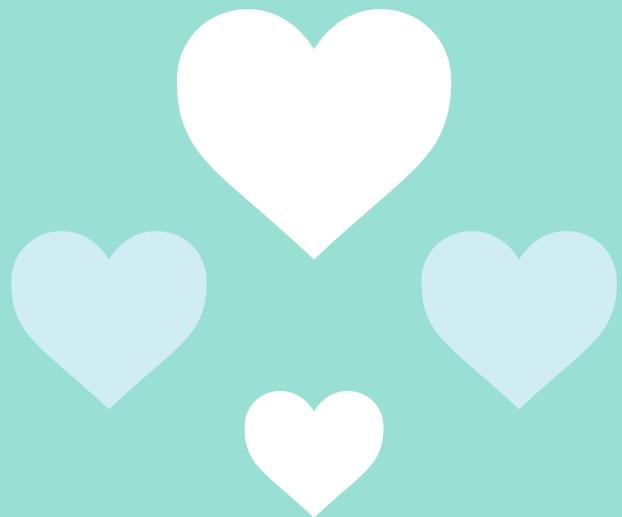
Mutually Beneficial

A one-sided relationship is one that won't last long. When any party feels taken advantage of, trouble is sure to follow. Successful partnerships are beneficial to everyone involved.

Similarly, signing a document typically implies that both side of the transaction will benefit from the agreement. Using eSignature software to invite signers ensures that the final version of the document is approved by everyone, in a timely fashion.

With traditional paper documents time is wasted mailing, emailing and faxing. Imagine receiving a document in the mail only to discover that something is inaccurate. Days will be wasted repeating that process.

With eSignature software it's as easy as declining to sign, giving a reason and the inviter uploading an updated version of the document. And there will be a record of that initial decline, to reference if necessary.

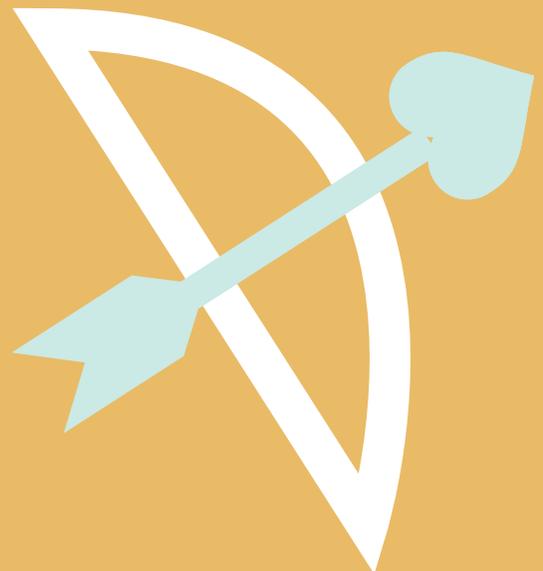


Having Your Back

One of the best things about a relationship is having another person who has your best interests in mind. It's incredibly reassuring knowing that someone will have your back if you need them to, even when things get difficult.

Having a signed document goes a long way towards resolving business disagreements, but it can often become a case of he said/she said.

With eSignature software, a full audit trail is available for signed documents. This record typically includes information on who signed, when they signed and from where. Also, all documents are securely stored in the cloud. This means no more lost papers or disputes about time, date and location.



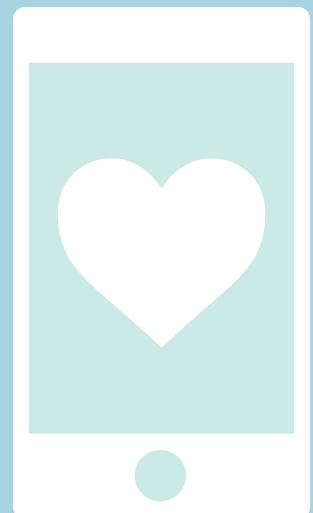
Making Your Life Easier

A good relationship means having someone who does things to reduce life's demands on you. We all have endless to do lists, so it means the world to have someone simplify even a small portion of your day-to-day tasks.

One such stressful thing is being asked to download, print, sign and fax a document. We all know that printers don't always cooperate and fax machines are going the way of the dinosaurs.

With eSignature software it's not only possible but actually enjoyable to sign documents — from any device and from anywhere. On a beach in Hawaii and need to sign something? Pull out your smartphone, add your John or Jane Hancock and get back to sunbathing.

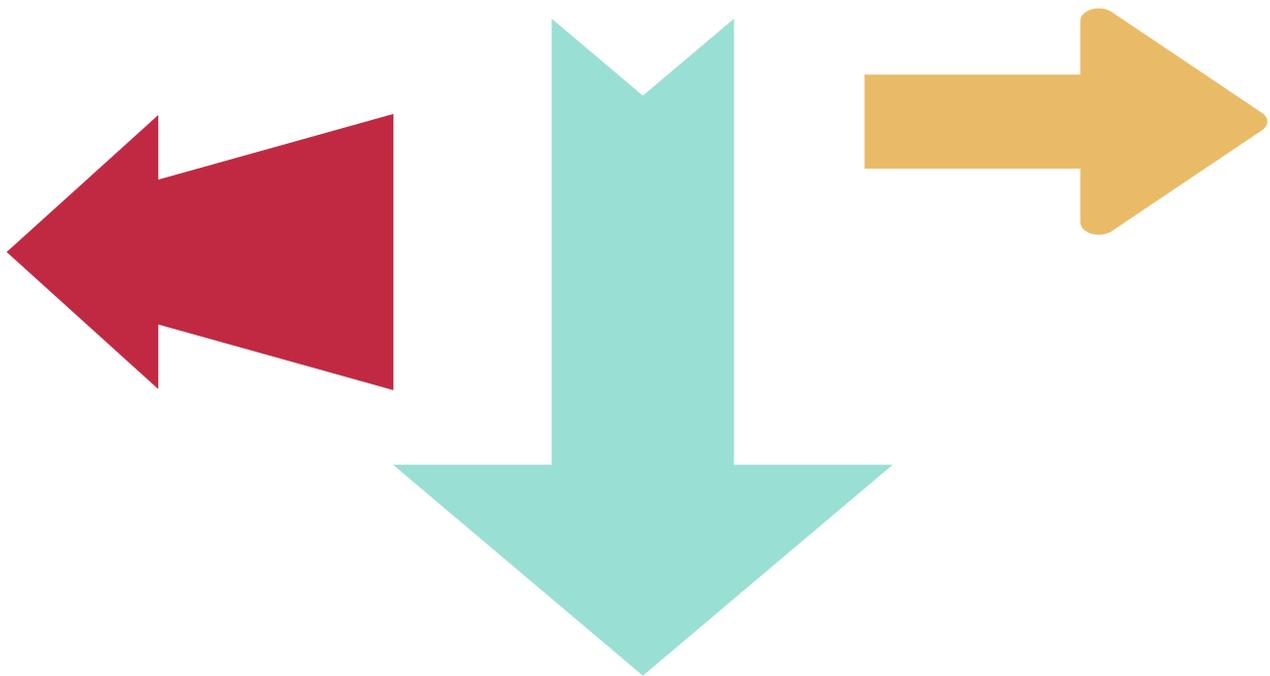
How's that for making your life easier?



When the tables are turned and you're in the customer seat:

HOW TO PICK A SOFTWARE PROVIDER YOU'LL LOVE

Picking the right vendor for your next software solution is no easy task. Technology investments are not cheap and the devotion of proper ramp-up time, resources and training is necessary for success with any solution. Often times you'll spend weeks, if not months, moving through the selection process. But when it comes time to make a choice, how do you know you're selecting the right one for your business? Which solution will add value and delight users?



MOBILE-FIRST SERVICE MANAGEMENT PROVIDER, EASYVISTA, SHARES THE SECRET TO CHOOSING YOUR SOFTWARE VENDOR MATCH.

In many cases, the core functionality of software offerings can appear so similar that the subtle differences in tech do not majorly impact your decision. This is when you realize you are no longer selecting a software solution but a vendor partner.

The key to picking a software solution you're going to love is the vendor behind it and that vendor must be customer centric. After signing the contract, your interaction with this solution provider is for better or for worse. Similar to a marriage, it's about partnership and trust, and essentially, about how this vendor guarantees your success as a customer.

Customer success is not a department; it's an attitude. You need to be certain that customer success is ingrained into the DNA of the vendor company. That means a top-down customer centric culture where an assigned customer success manager understands your goals and will help support those goals so you can keep expanding the value that product is providing to your organization.

To determine if your vendor has a strong customer success mindset, ask yourself these questions:

DO THEY TAKE THE TIME TO KNOW MY BUSINESS AND TO REALLY GRASP MY NEED?

This may seem obvious but it is very important. In order to foster success, a good vendor will spend the time to understand your current situation, your pains, your goals and even the culture of how you conduct your business. Only then will you have the confidence that they can get you where you're going.

CAN THEY GO BEYOND YOUR URGENT NEED TO SHOW YOU WHAT YOU MAY BE MISSING?

Sometimes, the key to your immediate success is to address an urgent pain. A good vendor will satisfy that immediate need but also help you look to the future to make sure you stay ahead of progressive IT strategies and industry trends. Your solution provider must be capable of showing how the product can support a clear vision that continues to drive maximum value to your organization. This ensures you will continue to love your software and be successful for years to come.

HOW DO THEY ENSURE YOU CONTINUE TO GROW WITH THE PRODUCT?

By providing regular review meetings to maintain open communication, a good vendor will prove with action and response they are ready to tackle new challenges with you. During these reviews you should be able to address issues for the present, but also start modeling your future. The customer success team must demonstrate a process to support your day-to-day and week-to-week progress.

DO THEY HAVE A COMPANY-WIDE MINDSET TO INCORPORATE YOUR INPUT AND FEEDBACK?

This open communication channel must be at every level of the organization. You must feel confident that the organization has mechanisms in place and a culture of accepting and acting on customer feedback, such as a customer community or regular customer meetings. You must also trust that your customer success manager will serve as your advocate across the organization.

DO THEY HAVE AN ON-BOARDING PROCESS TO FACILITATE THE ADOPTION PROCESS?

Your biggest challenge will be adoption. A good vendor will help with that. As your trusted partner, they must have a proven roadmap to do all necessary to help through the transition, even by working directly with your team members. The customer success team must also assist you with change management within your organization.

A product alone will not ensure your success; it is a team effort based on a good partnership with your vendor. Customer success cannot be a department, it's an attitude. Take the time to select carefully. Peel the onion, look beyond the shiny PPT presentation to the people, the processes, the culture, and the references that will verify the relationship doesn't end when the ink is dry!