

CITRINCOOPERMAN®

LEVERAGING TECHNOLOGY TO ACCELERATE BUSINESS GROWTH

A Guide to Maximizing Efficiencies and Building Customer Loyalty

Introduction

The buying experience has changed forever with the rise of companies like Amazon leveraging sophisticated technology to set new standards. Whether your customers are businesses or consumers, they expect a level of service that was unthinkable a decade ago. The good news is that the technology to support an automated, yet personalized, customer experience is within reach of every business. Technology can support the business processes to ensure great customer experiences — the kind of experiences that set your business apart and build loyalty with customers.



Eighty percent of customers said they have switched brands because of poor customer experience.

QUALTRICS

Identify your priorities and take the first step

There is no doubt that transforming your business into a customer-centric organization is challenging. Taking a measured approach, you can determine which processes are most important to your customers and take them on one at a time. In this guide, we will explain your options and help you set the course to:

1. Provide customers with self-service options
2. Empower your mobile workforce
3. Accelerate response times
4. Equip salespeople with complete information in the field
5. Automate customer notifications
6. Personalize communications for targeted marketing

Read on and take the first step to give customers the kind of service that keeps them coming back.

STEP 1

Provide customers with self-service options

Research shows that customers prefer to schedule appointments or check the status of their order online. Self-service is a win-win because your service reps have more time to focus on the customers who need personalized attention.

By 2025, 95% of customer interactions will be powered by AI.

AI BUSINESS

> Stay ahead of your competitors by recognizing and responding to customer preferences.

START WITH THE BASICS FOR ONLINE SELF-SERVICE

Customers do not expect you to have the level of online service that a global company offers, but they do want the option to manage the basics, including:

- **Account management:** Place orders, view, and pay invoices.
- **Tracking orders and scheduling services:** Check the status of an order from entry to shipment and schedule service times.
- **Product and service information:** Evaluate and compare products, features, and service options.

TECHNOLOGY THAT DELIVERS

To support online customer service options, integrated business management systems provide the foundation for responsive interaction, including:

- Engagement with customers via their channel of choice across web, social, chat, and mobile platforms.
- Deployment of cost-effective portals for customers and employees to provide fast, secure access to information, documents, and transactions.
- Centralized support to reduce service response times, improve case resolution, and increase customer self-service with a knowledgebase.

Stay ahead of your competitors by recognizing and responding to customer preferences. With modern systems, you demonstrate your commitment to grow with your customers.

STEP 2

Empower your mobile workforce

Companies that started in the last three years tended to be either completely remote (31%) or hybrid (47%). Less than half (43%) of companies that were fully in-office before the pandemic are still fully in-office.

GUSTO

In today's business, it is imperative that employees are able to work from any place at any time. Your team needs to be able to work remotely to deliver the best possible customer experience, responding to problems and changes in customer requirements as soon as they occur.

GIVE YOUR TEAM THE TOOLS THEY NEED TO SUCCEED

Outdated business processes and an abundance of paperwork put unnecessary hurdles between your employees and their objectives. To succeed, your company needs:

- **Access to information:** Give employees the insights they need to do their job, when and where they need them.
- **Automation:** Faster, more efficient scheduling, billing, and workflow.
- **Efficiency:** Less time spent on manual work like entering data and searching for documents.

MOBILIZE, COLLABORATE, AND STREAMLINE

Integrated business management systems give your employees the tools they need to succeed any place and any time with:

- Improved collaboration with project teams that allow subject matter experts to add high value and keep proposals and projects moving forward.
- Streamlined, automated scheduling tools and mobile alerts that ensure services are delivered on time and customers are informed of changes.
- Electronic billing that accelerates cash flow, allowing your service techs to process the work order before they leave the customer's parking lot.

Fully connected and equipped with modern devices, your employees will be proud to represent the business. Customers with confidence that they are investing in the future are less likely to expect discounted pricing for premium service.

"Integrated business management systems give your employees the tools they need to succeed.

STEP 3

Accelerate response times

> An integrated business management system will help you deliver in the age of immediacy.

Whether employees are in the office or in the field with their tablets, there is no reason they should ever be unprepared. With a modern, integrated business management system, your workers can work smarter and faster to keep customers happy and accelerate cash flow.

CAPITALIZE ON YOUR COMPANY'S DATA

When your employees are talking to a client, they need to be able to answer questions quickly and accurately. For truly customer-centric service, you need:

- **Consolidated data:** Data on customers, products, scheduling, and services should be in one unified, easily accessible form.
- **Accurate product and service status:** Customers need to know what is in stock, when to expect delivery, and where they fit in the schedule.
- **Easy access to documentation:** Customers want to find answers themselves, from contract terms to product options.

BUILD STRONGER CUSTOMER RELATIONSHIPS

Customers do not want to be kept waiting. An integrated business management system will help you deliver in the age of immediacy with:

- Service technicians who have the parts and product information needed to fix the product on the first call.
- Service reps who can answer questions on order history, inventory availability, shipping, and order status without checking three systems.
- Support for online ordering, tracking, shipping estimates, and more customizable options for customers.

When employees can provide fast, accurate answers and a convenient, personalized experience, customers will have no reason to look elsewhere. The right business management systems will encourage loyalty from your customers.

Ninety percent of customers view an instant response as either crucial or very important when they need customer service assistance.

SUPER OFFICE

STEP 4

Equip salespeople with complete information in the field

Mobile technology has transformed the business landscape, giving your salespeople a whole new set of tools to grow your business. A more efficient sales force is good for everyone — your business and your salespeople prosper and your customers stay happy.

Forty-seven percent of digital workers struggle to find the information needed to effectively perform their jobs.

GARTNER

A BETTER, FASTER SALESFORCE

When salespeople have access to the information customers need in the field, they can negotiate and close the deal faster. Taking advantage of mobile technology can accelerate your sales cycle by enabling salespeople to close transactions with fewer customer interactions and reducing the time between ordering and billing.

PUT THE MOBILE REVOLUTION TO WORK FOR YOU

Every customer and sale are unique — your salespeople need insight across your organization to handle the unexpected. The right system gives you and your sales force everything you need to:

- **Lower sales costs:** Eliminate return calls and other expensive delays when salespeople have real-time access to inventory availability, account history, and detailed product information in the field.
- **Increase sale values:** With full inventory and margin information, salespeople can negotiate to build sale values while maintaining profits.
- **Speed cash flow:** When orders are processed immediately, you can get production going or services scheduled to deliver and collect faster.

When your employees deal with customers in the field, they need to be able to turn on a dime. Empowered employees with information at their fingertips build confidence and a closer bond with customers.

> Every customer and sale are unique — your salespeople need insight across your organization to handle the unexpected.

STEP 5

Automate customer notifications

Forty-three percent of respondents said they were at least somewhat likely to switch brands after only a single negative customer service interaction.

QUALTRICS

Customer expectations have been completely reshaped over the past decade with the widespread adoption of the Amazon model. Whether your business includes products, services, or a combination of the two, it is critical to keep pace with the trendsetters in customer service.

NO ONE LIKES SURPRISES IN BUSINESS

One of the most important parts of keeping your customers happy in the digital age is keeping them informed. Your customers want to know:

- If their order was successfully placed and received.
- That scheduling is accurate and dependable and that they will receive notification of any delays.
- When orders are in production or have shipped.

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KEEP YOUR CUSTOMERS IN THE LOOP AT ALL TIMES

An integrated business management system has all the tools your business needs to keep clients updated on orders and schedules. You can keep your customers in the loop with:

- Automated, immediate order verification and confirmation so customers can be confident their order was placed and received correctly.
- Prompt notifications of backorders, inventory problems, or any other delays in order fulfillment.
- Accurate schedules for service technicians and real-time tracking that can provide alerts when there is a delay.

Proactively providing information to your customers demonstrates your commitment to keeping up with modern business practices. When your current customers keep coming back, you do not have to spend so much time and money replacing them.

STEP 6

Personalize communications for targeted marketing

Your customers see their interactions with your business as a relationship. They expect you to know them and remember their preferences and interests. You have the data. The challenge is gathering, analyzing, and putting that information to work.

Seventy-four percent of marketers say targeted personalization increases customer engagement, and they see an average increase of 20% in sales when using personalized experiences.

CAMPAIGN MONITOR

> Building a personalized journey allows you to increase the lifetime value of each one of your customers.

MAKING YOUR DATA WORK FOR CUSTOMERS

The data from your ongoing interactions with customers should guide your communications and marketing. To achieve that goal, you need systems that will:

- Consolidate the data from transactions and other interactions with each customer in one place.
- Help you analyze customer data to identify trends and predict behaviors.
- Personalize communications to customers based on the data.

THE RIGHT TOOLS FOR THE JOB

The power of an integrated business management system is in tracking individual experiences and understanding overall customer behavior. You can target your marketing by:

- Combining data from across the organization to identify cross-sell and upsell opportunities.
- Analyzing buying trends to predict customer behavior and proactively promote products and services.
- Automating marketing, using data to drive personalization.

Building a personalized journey allows you to increase the lifetime value of each one of your customers. Sell more products and services to your existing customer base instead of always chasing new business.



> The time to take control of your data and to replace your old, obsolete business management system is now.

Focused on Success

Every modern business is trying to put processes in place to keep pace with changing customer expectations. As we have seen, the common denominator across these processes is data. To get the most value from your data, you need centralized systems that keep information flowing across the business and into the hands of your employees — no matter where they are.

The time to take control of your data and to replace your old, obsolete business management system is now. Modern CRM and ERP systems are affordable, quick to implement, and more user friendly than ever before. You have plans for the future of your business, and we are here to help you realize those dreams.

How Citrin Cooperman can help

Citrin Cooperman's Digital Services Practice provides technology consulting by applying creativity and experience to accelerate the growth of mid-sized businesses. We help our clients modernize systems and processes through automation, mobility, and workflow improvements. We believe that:

- **Technology should accelerate and extend:** We go past technology hype to achieve real business returns.
- **Nothing should be taken at face value:** The solution to a problem may not be what it seems. We bring fresh perspectives based on deep experience, recommending simple yet effective solutions.
- **Business is personal:** We take our commitment to clients very seriously.

Our team is well-equipped to help you tackle the challenges you are facing by identifying and customizing solutions that will take your business to new levels. Reach out to Eric Casazza or Jory Weissman for more information.



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About Our Digital Services Practice: *At Citrin Cooperman, we think of digital services differently. Our comprehensive approach takes your entire business into consideration, taking the most advantage of accelerating technology and business processes to help you achieve your strategic vision. Data management and security are critical as we move into processes augmented by artificial intelligence (AI). Deploying data collected by both back office and frontline workers demands strategic integration across platforms while keeping a keen eye on compliance and cybersecurity. Our team is well-equipped to help businesses leverage customized technologies to streamline efficiencies, maximize performance, and achieve their organizational goals.*

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