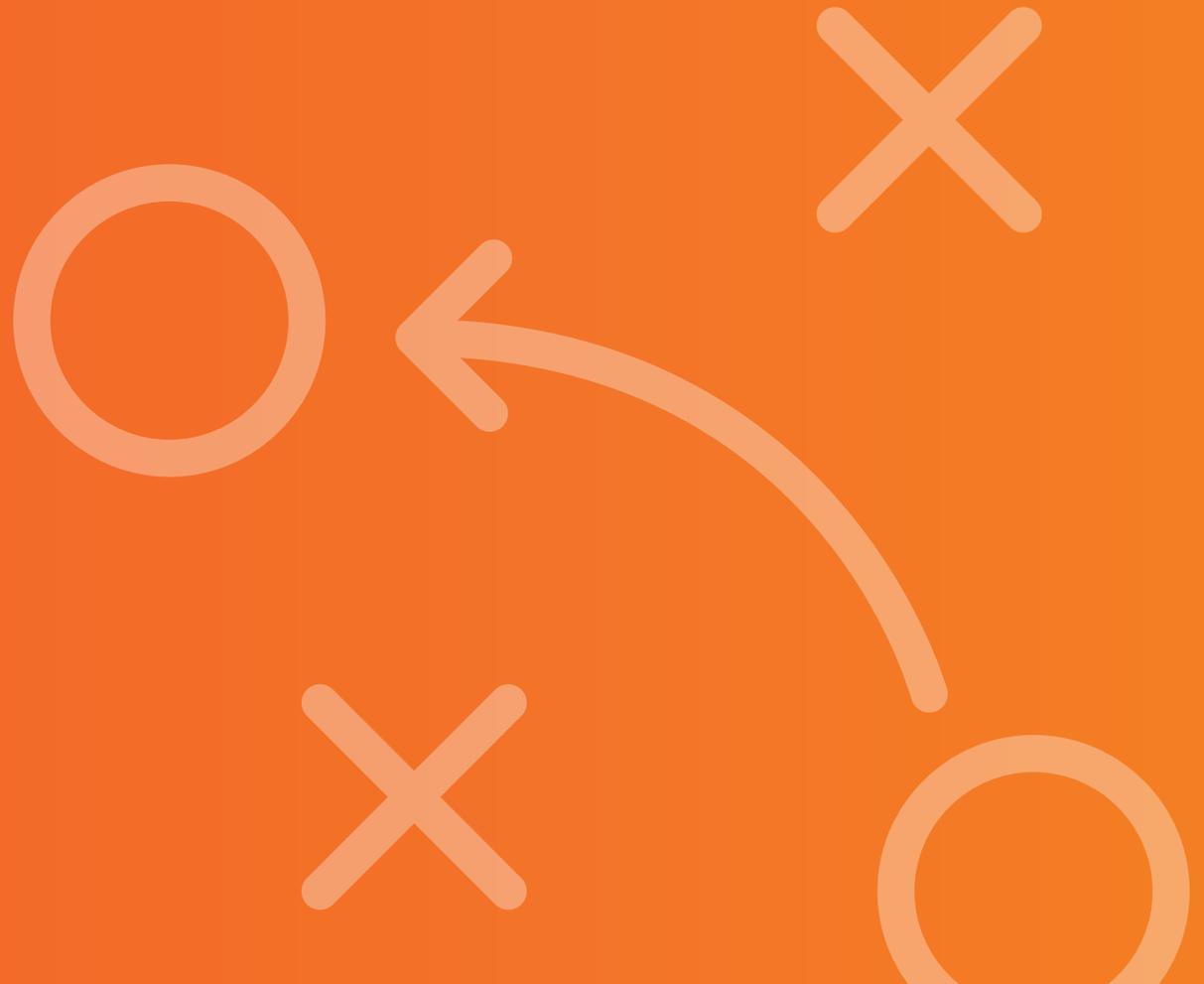


 higher logic

eBook

The Customer Engagement Playbook

6 Elements of a Winning
Customer Engagement
Strategy



“Champions aren’t born. They’re made.”

You’ve probably heard this quote in some form or another over the years. If you’re like us, you remember hearing it as a kid playing youth sports when your jump shot was a little off, your pass wasn’t going to the right person, or you weren’t sticking that big landing. The motivational quote was always a little annoying to hear back then, but it makes a solid point: **with the right mentality, focus, practice, and perseverance, anyone can be a champion.**

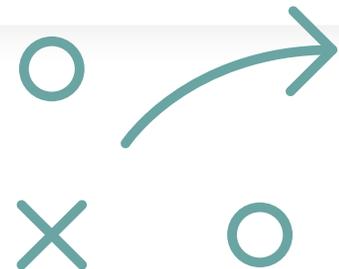
Most of us never went on to become professional athletes. And that’s ok. We can apply the same lessons learned outside of sports. Take your customer engagement strategy. You could send your customers marketing emails from time to time. Or have your CSMs check in once a year. Or simply wait and hope that if your customers have any issues, they will get in contact (not a great strategy, since **silent customers aren’t necessarily the happiest**). But each of these actions on their own will leave you stuck in the minor leagues.

If you really want to craft a winning experience for your customers, you need to look at customer engagement in its entirety - who you’re talking to, how you’re communicating, what tools you’re using to do it, and how you can measure and optimize the process.

Ready to knock your customer engagement out of the park? Here’s your playbook for building a customer engagement strategy fit for champions in 6 steps.

WHAT’S INSIDE?

- Aligning around the customer
- Creating a hybrid engagement strategy
- Coordinating customer engagement efforts
- Finding the right partners
- Segmenting your engagement tactics
- Scoring customer engagement



ALIGNING AROUND THE CUSTOMER

1. Develop the heart of a champion

Teams work best when they work together to achieve a common goal. True all-stars obsess about achieving that common goal – they play with passion.

To ensure that your customer engagement strategy thrives, you need to get your entire organization aligned around one thing: your customers. Customers should be the beating heart across everything your organization does and across each and every department. To encourage a customer-centric mentality, company KPIs should be centered around customers and include customer engagement goals, and all departments must come together as one unified front that caters to customers with a clear vision and consistent voice.



Customer engagement is one of the most important metrics businesses need to pay attention to, regardless of their growth stage or maturity level. Customer retention and engagement directly affects the bottom line of your business, increasing your profitability since it allows you to grow without depending too much on your customer acquisition costs. **Customer engagement is not a marketing strategy – it's a mindset.** Your entire company must have a sense of customer obsession that will inspire the product team to build better products, your support team to serve customers better and the marketing team to generate useful content for existing and potential customers.”

- **Raul Galera**, Partner Manager, [CandyBar](#)

This mentality might require a culture shift within your organization, but it will be worth it, considering that customer-centric companies are **60% more profitable** than companies that don't focus on customers. Or that **84% of companies** that work to improve their customer experience report an increase in their revenue.

**The benefits go beyond profits and revenue.
By focusing your organization's efforts on driving customer engagement, you can:**

- 1. Build a strong foundation for retaining current customers:** The more you engage your customers, the better those relationships and the stronger your company.
- 2. Nurture your brand advocates and create new ones:** As people get more engaged, they will develop a closer and closer relationship with your brand. One that goes far beyond simply using your products or services. One that we like to call **Higher Love**. As customers fall deeper in love with your brand, you'll gain more **brand advocates** and referrals.
- 3. Gain valuable insights that drive product development, marketing content, and sales programs:** The **data** that you gain access to, particularly when you incorporate a branded online community into your strategy is vast and can inform all areas of your business so that you can make smarter decisions that impact the future of your company.

CREATING A HYBRID ENGAGEMENT STRATEGY

2. Scour the playing field

Winning teams put in the legwork, studying reels and reels of tapes of their own performance, as well as those of their competitors. This background is crucial to understand where they can improve and how they can stay one step ahead of the competition.

You need to put in the same dedication to understand how to best segment your customers and how and when to best communicate with each segment. This will most likely require a hybrid approach with 1:1 customer engagement, 1:many (high tech, low touch – think marketing newsletters and campaigns), as well as a many-to-many approach.

What's a many:many approach, you ask? Many successful organizations use online communities to effectively engage their customers at scale. We like to call it a many:many approach because a community allows your customers to connect with each other and with you, 24/7, in a space your organization owns.



HOT TIP!

Learn more about how a many:many approach can make all the difference →

Online communities are a great place to centralize all your engagement content so that your customers can easily find the resources they want and need when they want and need them. Plus, they allow your customers to engage in open and collaborative dialogue with each other, giving advice, sharing best practices, and making new connections.



The community isn't another engagement tool for your customers, it is the engagement hub for all activity. It's not just a place to deflect support tickets, **it's the hub for your academy, your onboarding, your networking, your advocacy.** It's the central operating plan for your entire customer experience to revolve around. There has to be a reason for your customers to come back, to engage, to be inspired."

- **Ari Hoffman**, Director of Customer Advocacy, [Coveo](#)

By layering an online community into your customer engagement approach, you'll also gain access to rich insights about your customers, their needs, and what gaps you can fill. Plus, if you are missing critical information about your customers, you have a quick and easy way to get answers – simply ask!

COORDINATING CUSTOMER ENGAGEMENT EFFORTS

3. Hire a coach

As with any high-performing team, you'll need someone driving your strategy, calling the right plays, and training and motivating the team. Think of it as your customer engagement coach. This central leader will ensure that you have a centralized place where customer communication and engagement initiatives are managed. This avoids communication overlap and overload, where multiple different teams could end up bombarding the same customer.

Typically, your customer engagement coach will sit in the CX team and will be the gatekeeper of customer communication. This person (or team of people if you decide to manage with a working group from across departments) will be responsible for developing guidelines and rules of engagement, leading the customer engagement strategy, setting the tone of voice, as well as training and coordinating across departments like product, marketing, and support to ensure that the voice of the customer is heard and catered to throughout the organization.

FINDING THE RIGHT PARTNERS

4. Stack a solid bench

Winning teams need more than one star player. And so does your customer engagement strategy. Not only should your entire organization be aligned, but you need to find the right partners to help bring your engagement strategy to life. You'll want partners who can support each aspect of your hybrid customer engagement approach with 1:1, 1:many, and many:many customer engagement.



Hint: Facebook Groups are not sitting in the winners' circle.

Here's why →

When you're ready to build your online community (as part of your many:many program), Higher Logic can help your customer community thrive. We have the right size solution for your company – and a team of industry-leading community consultants who can help you launch, build your community, keep customers coming back, analyze their behaviors, and more.

LET'S CONNECT →

5. Communicate with your fans

Now it's time to dig in and drive customer engagement. However, not everyone will be at the same level of familiarity with your brand and products, nor will everyone have the same revenue potential. Some might be leads, some relatively new to your products, and others complete brand advocates. You can't approach each of these segments the same. Your strategy is doomed if you don't personalize and adjust messaging and touchpoints across your customer segments.

Keeping with the sports analogy, you can think of several different tiers of fans and potential fans - a person just learning about the sport vs. someone who is experiencing their first game vs. a long-time season ticket holder. Each of these groups is at a very different stage in their lifecycle and should be engaged accordingly.



EXAMPLE

This means that depending on the segment or tier your customer falls into, your engagement response will change. For example, if they are in a high revenue segment, and you see they're not engaging in the community, you might have a CSM go give them a personal presentation about why they should get involved. If they are in the lowest revenue tier, you might instead set up a lower-effort email campaign about why they should get involved in the community.

Alicja Olko, Outreach Specialist at [ReferralCandy](#) explains how they engage the largest companies in their customer base:

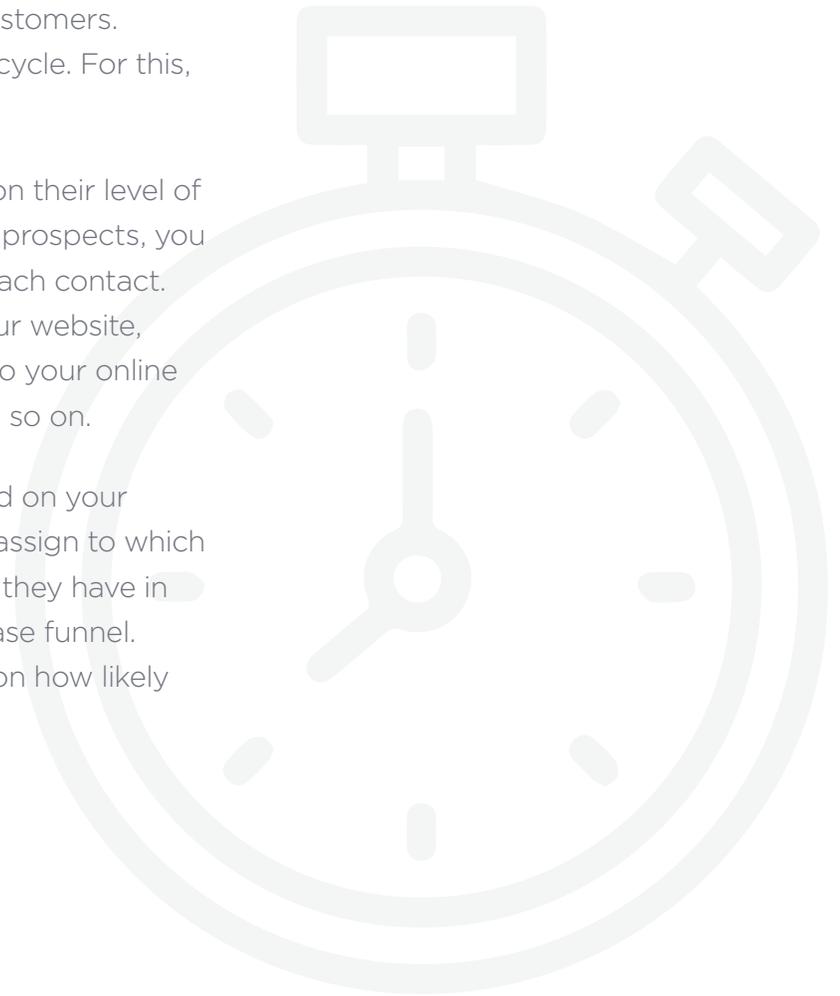
“Our product, ReferralCandy, works almost exactly same for both startup companies as it does for multimillion-dollar businesses. The product serves the same purpose: it helps brands leverage the power of word-of-mouth by allowing them to automate their customer referral program. However, we understand that bigger businesses have different needs, so we adjust the way we communicate with clients accordingly. For enterprise clients, we typically have an account manager that serves as the main point of contact with us, helping them not only during the setup process but making sure that their account is running smoothly. This gives clients peace of mind knowing that the product is running the referral program on auto-pilot but also knowing that there's someone at ReferralCandy making sure that their program is achieving its full potential.”

6. Going into overtime

You might be wondering how exactly to go about segmenting your customers. Perhaps you lack certain data to identify where someone is in their lifecycle. For this, we're huge proponents of customer engagement scoring.

Engagement scoring is a fantastic way to segment your users based on their level of engagement with your brand and products. Similar to lead scoring for prospects, you want to attach numerical points to interactions and attributes tied to each contact. For example, you could give one point to everyone who has visited your website, another 10 to those who register for a webinar, 20 to those who log into your online community, 50 to those who answer a question in the community, and so on.

To set up, you need to define your criteria and your point system based on your company goals and your current data. To understand which points to assign to which interactions, you'll want to look at your customers to understand what they have in common and which engagements helped drive them down the purchase funnel. Then, you can decide how to weigh interactions and attributes based on how likely these are to push them further along in their customer lifecycle.



Once you've segmented people based on their engagement score, you'll need a framework for communicating effectively. Here's a simple, yet oh-so-powerful three-pronged approach:

- 1. Listening:** First, we listen to what each segment is telling us – in survey responses, in net promoter scores, in search queries in our knowledge base, and within our online community.
- 2. Producing:** Then, we analyze all of the data from our listening and produce content, events, and resources based on what the data tells us each segment wants.
- 3. Distributing:** Finally, we assess the best channels on which to deliver the content that we've produced for each segment. The higher the engagement score and revenue potential, the more personalized the distribution method. The lower engagement score and revenue potential, the more automated the communication strategy will be.

This framework not only helps to engage the right people with the right content at the right time, but it also helps CX, sales, and marketing teams to focus their efforts on the right people with the right revenue potential.

Your goal as you segment, personalize, and engage is to find ways to best nudge your customer into the next phase of their lifecycle. Each level up in the lifecycle tends to provide more recurring revenue, more brand loyalty, and a higher customer lifetime value. Think of it as climbing a ladder where each step up is a higher level of engagement, and you want to help your customers get to the top of the ladder (aka season ticket holder status).



We call this the engagement ladder: It's all part of building Higher Love. [Learn More →](#)

Practice and perseverance make perfect

A true champion never gives up, even in the face of defeat. A winning engagement strategy won't either. You'll need to continuously adjust, amend, and develop new programs based on what you are learning about your customers and how they respond to the programs that you run.

With tools like an online branded community, you have a solid backbone of information about your customers' wants, needs, and complaints, but don't be afraid to learn as you go. You'll find that some new programs or initiatives work better than others. That's perfectly normal. As you see what is working best, you can ramp up those pieces of communication or better leverage that particular channel. If one program flops, then try to understand what didn't work, and pivot your planning accordingly. What's important is that you do adjust and that you do communicate regularly with each segment of your customers.

As your company centers its strategy around your customers, you'll want to build out an engagement strategy fit for champions. By aligning all business units within your company, segmenting your customers based on their lifecycle stage, their revenue potential, and their current interactions, and engaging with the right forms of content on the right channels, you can make them truly fall in love with your brand and your products. It happens here. It happens now. Cheering fans are waiting on you. Take the shot (we promise you'll hit nothing but net).

Want to learn more about Higher Logic's online community platform?

LET'S CONNECT

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