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HOW-TO GUIDE

# Delivering Data-Driven, Personalized Support at Scale



The digital age has transformed not only how companies interact with customers, but how customers choose to interact with businesses. And this transformation has only accelerated over the past year, with 89% of consumers expecting businesses to proactively reach out to them if there is a problem, and **83% of consumers expecting to be treated better for being a loyal customer.**

In this new business landscape, where customer service can be a real competitive advantage, many companies are realizing that an internet connection is not the same as a personal connection. In fact, just as it has become easier for customers to get in touch with companies across an array of channels, **it is also becoming more difficult for companies to identify, understand, and speak directly to the specific needs of their customers.** Customers expect quick service, and also for the company to arm their customer service agents with the information they need to succeed — such as order history and

communication preferences. Customers don't want to have to repeat themselves or spend time getting an agent up to speed.

To succeed in this new era of customer service, companies have to figure out how to personalize the way they connect with their customers, using real-time, contextual data to deliver meaningful, uninterrupted conversations. If they can do this, they'll reap the benefits of turning customers into happy, loyal brand advocates, and boosting revenue in the process. So how do you transform your customer service strategy from a

one-size-fits-all approach to a one-size-fits-one? This guide will show you why personalizing your support strategy is crucial for your business — and how to do it.

## Table of Contents

- What Personalization Means for CX Organizations
- The Psychology Behind Personalization
- The Importance of Knowing Your Customers
- Why You Should Meet Customers Where They Are
- Using AI to Interact More Intelligently



## Why Personalization?

The modern customer wants to buy a product or service, but they don't want to be treated like a transaction. They're expecting an experience — and if that experience is a positive one, then a one-time purchase often becomes a lifelong interaction with a company that understands their wants, needs, pain points and history. Unfortunately, most companies are still living in the early-digital dark ages, treating their customers like tickets in a queue rather than individuals with real desires and concerns. Instead of marshalling their vast stores of data to proactively identify and engage specific customers, many companies are still relying on outdated customer service models that waste their money and their customers' time. This misguided approach frustrates customers—and can hurt a businesses' bottom line. Poor customer service costs companies \$75 billion a year, and 90% of consumers would not shop with a business again if they provided bad customer service.

On the flip side, companies that truly know their customers — everything from their previous purchases, customer service conversations, and preferred channels of communication — often experience double-digit growth, and nearly half of customers spend more when their experiences are tailored to their particular wants and needs. To retain customers in an increasingly saturated and competitive digital marketplace, companies must learn to quickly and seamlessly address customer needs and concerns as they arise. In other words, they need to use real-time data to give them a 360-degree view of their customers — and then **use that data to deliver relevant, personalized, helpful interactions that make the customer feel seen and heard**. This approach will transform customers from flashing lights on hold, to real people. And when customers are treated like people, they're more likely to become not only repeat purchasers, but your most loyal cheerleaders.

A photograph of a man with a beard lying on his back on a white surface, holding a smartphone in both hands. Sunlight filters through a window, creating a pattern of light and shadow across his face and the surface he is lying on. A solid red vertical bar is positioned to the left of the text.

Poor customer service  
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## The Psychology Behind Personalization

Personalizing a customer's experience makes intuitive sense. After all, **nobody likes to be treated like a number**, and everyone appreciates attention and customized service. But personalization also makes psychological sense. In fact, one study found that customers prefer personalization because it increases their sense of control and decreases feelings of being overwhelmed from information overload. Customers often face the paradox of choice, or rather the conundrum of sifting through page after page of similar products which can make them doubt their ability to choose the right option. But if the customer knows that the company is curating products and only showing them what they think they will like or need, then the customer feels empowered to make informed decisions (and it may foster some good will towards the company in the process).



This same theory can be applied to customer service interactions. [A Customer survey](#) found that 64% of consumers have had to repeat information multiple times when contacting customer service. This kind of disconnect can mean the difference between a customer who makes a repeat purchase and a customer who switches to a brand that makes them feel seen and heard.

**64% of consumers have had to repeat information multiple times when contacting customer service.**

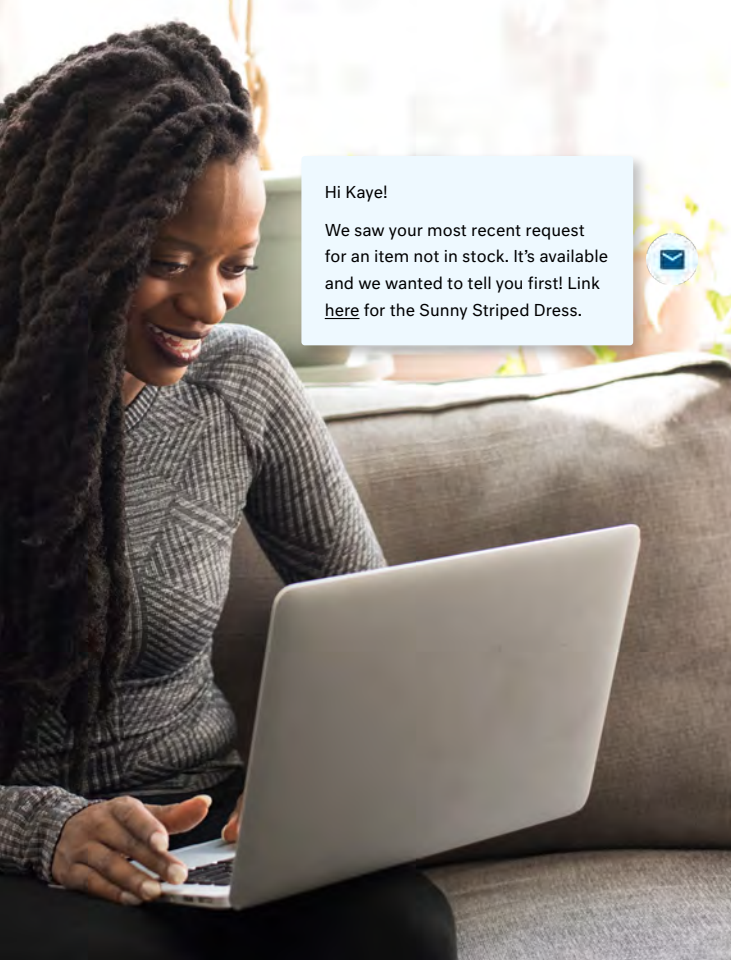
## Getting Down to (Personalized) Brass Tacks

All this personalization stuff sounds great, but how do you actually implement these practices within your CX organization? And how do you translate personalized customer experiences into personalized customer service? It's actually pretty simple. Businesses that want to personalize customer experiences need to know a lot about those customers — what they've previously purchased, how they prefer to engage, and what conversations they've already had with people at your company. **This kind of holistic customer view enables service teams to communicate with customers on their terms**, while demonstrating knowledge of that customer's experience with their brand. This is an incredibly huge undertaking, especially for the agents tasked with facilitating these interactions. That's why it's also important for companies to consider the agent workload, and what technology they can implement to help.

Want to become a CX organization that excels at delivering personalized support? Follow these three steps to personalize your customer experience and build lifelong brand loyalty.







Hi Kaye!

We saw your most recent request for an item not in stock. It's available and we wanted to tell you first! Link [here](#) for the Sunny Striped Dress.



## 1 Know Your Customer

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 call and helps them deliver more efficient, proactive and relevant service. Imagine a customer service scenario where the agent has access to the customer's entire order history, past conversations and up-to-date delivery information. In this situation, there's no need to waste the customer's or agent's time by asking them to repeat their name, address, question or concerns. Instead, that information is available at the click of a button, allowing the agent to personalize the customer's experience, give fine-tuned advice, address problems proactively, and suggest other products or services

the customer might enjoy. The result? An efficient but personal interaction that builds lifelong customer relationships.

Rather than adapt, however, **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: 93% of consumers think retail customer service should be more convenient. Fortunately, the fix is simple: a platform that can collect, organize and streamline customer data so it's all in one place.

**93% of consumers think retail customer service should be more convenient.**





## 2 Meet Customers Where They Are

Your customers are active across a variety of different platforms and devices — are you? **If half of winning is showing up, successful companies need to meet customers wherever they are, whenever they can.** This means being available on multiple channels at all times — and sharing the information and conversations from those channels in one place. Right now, most companies are available on various online platforms — from email to Instagram to live chat — but they aren't collecting the information from the different platforms and organizing it in one place. As a result, they treat customers like items on a to-do list, addressing each of their issues in a silo. If a customer calls about an issue with an order and later tweets the company about a delay, that information isn't stored in a common location and causes agent collision — when different

agents from different teams are unaware they're fielding the same issue and offering different resolutions. As a result, the customer ends up confused and likely has to contact the company more often, repeating the same information to each new customer service agent and explaining the issue again and again. And this wastes everyone's time.

But there's a solution. Creating a true omnichannel presence allows a company to see the whole picture, aggregating customer interactions across platforms and allowing agents to solve a customer's issue with context. When a company adopts an omnichannel approach, they free the customer to contact them whenever, however, and on whatever platform is convenient — and to switch platforms at any time without having to start the conversation over from scratch. With omnichannel support, a customer can contact you about an order via email and then call you later to follow-up — without having to repeat her name, location, or issue multiple times. According to Kustomer research, 87% of consumers get

frustrated when they can't contact customer service on the channel they prefer, so providing a seamless experience across channels is now table stakes. With omnichannel customer service, all the information is right at the agent's fingertips. This not only solves a customer's issue faster and more effectively. It also turns the interaction from a transaction to a relationship, and the problem from a ticket into what it should be: an ongoing conversation with the customer.

**87% of consumers get frustrated when they can't contact customer service on the channel they prefer.**



Hi Mary-Ann!

Your order should arrive this Saturday, the tracking number is #1938757303. Please reach out again if you need anything else!



### 3 Use Artificial Intelligence to Interact More Intelligently

Many companies avoid the subject of automation because they are worried that it will make the customer service experience less personal. In fact, using automation intelligently allows computers to do the manual and analytic work, freeing customer service agents to be more personal. Instead of spending time doing low level tasks, customer service agents can use their creativity to build relationships and solve problems.

There are a lot of ways companies can harness automation intelligently. On a basic level, they can assign busy work — like tagging of conversations or preliminary customer service interactions — to AI, allowing them to focus on the customer's problems, needs and wants. For example, a customer who

contacts a customer service center to replace a pair of defective speakers is first and foremost looking for problem-solving and understanding. With the help of AI, a customer service agent can devote all their energy to sympathizing with and resolving a customer's issue — and kick the nitty-gritty stuff, like returns and reorders, over to a machine. Or, companies can use chatbots to help funnel a customer to the right person or department, then let the agent take over for the more substantial conversations. **These interventions save time for both customer and agent**, and increase time spent on the actual issue, boosting agent productivity.

Beyond basic automation, companies can use AI to keep customers engaged with your brand, even if they aren't actively reaching out. This type of proactive support can help companies get ahead of potential issues before customers are even aware of a problem, or even create opportunities to build loyalty and generate sales. For example, automation can do the heavy lifting in identifying VIP customers you'd like to target with a promotion, thanking them for their loyalty. The result? Your best customers spend more time on your site, make more purchases, and feel a valued connection to your brand.

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## Don't Forget

To create meaningful, relevant experiences, companies need to adopt technology that allows them to see their customers' history, issues and behavior in context.

Today's customers are interested in speed, quality products and excellent customer service — but they're also interested in connection, relationships and personalized experiences.

To create meaningful, relevant experiences, companies need to adopt technology that allows them to see their customers' history, issues and behavior in context. They also need to provide omnichannel support that allows customers to

engage across platforms in an integrated, ongoing conversation. And finally, they need to use intelligent automation to help with tedious and analytical tasks so their customer service agents can provide customers with prompt and personal customer service. Businesses that do this will accomplish treating the customer as a whole person — and gain lifelong loyalty in the process.

## About Kustomer

Kustomer is the top-rated CRM platform for omnichannel customer experience, helping leading businesses create customers for life. With an advanced, AI-powered, omnichannel customer experience platform, Kustomer delivers a unified single view of the customer, automates manual tasks, and scales easily to deliver the efficient and effortless CX that businesses, agents and consumers love. Today, Kustomer is the core platform of top customer-centric brands like Glossier, UNTUCKit, Ring, 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.

Want to learn how Kustomer can help you deliver on retail consumer expectations? **Visit [Kustomer.com/Demo](https://kustomer.com/Demo)**

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