
PR1- A2: Consultant Training Toolkit

Chapter no.: 5 Technical skills for online customer retention and using platforms, customer relations and communication

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1.0 Information about Chapter

Chapter's title: Technical skills for online customer retention and using platforms, customer relations and communication
Duration: 5 hours
A short introduction to the chapter: Communication with the client is one of the most important things in a business. Maintaining a good relationship and communication with your clientele is halfway to a successful business. SMEs need to pay attention to their customers, what they think, and if they are satisfied with the products/services provided. So, it is important to have tools that help organisations reach their clients to maintain good relationships and provide two-way communication via different channels. It is crucial to know how to communicate in a time of crisis and to have the right tools to do so. In an era of digitalisation where everything is online and automated, it is even more vital to be familiarised with these tools for a fortified relationship with your customers. In this chapter, learners will learn strategies for online communication, ways to improve online communication and the tools and programs to make all this possible. In addition, they are learning how to take advantage of the available tools online to provide good customer service and which ones are more suitable for their business and target group.
Methods of instruction: <i>This chapter will use a ppt presentation as a method of instruction. Learners can go through slides with information on the topic and be guided to specific valuable links with further information and videos related to the topics covered.</i>
Prerequisites of the students: <i>The learners require no basic knowledge of online customer communication.</i>
Learning aims and Objectives: The main aims and objectives of this chapter focus on: • Helping learners understand the importance of customer communication in a business • Awareness of strategies for online customer communication • Supplying learners with information about customer communication and digital communication • Educating learners on all types of tools and platforms available for good online customer communication • Exploring available tools and platforms for customer communication
Learning Outcomes Covered: After completion of this module, the learners will be able to: • Understand how to communicate in a time of crisis.

- Identify the best strategy of communication for each situation and being able to apply it.
- Learn the difference between all the types of online communication tools and their purpose.
- Understand which tool applies best to their business and the type of communication they want to do.

Skills and Competences:

Skills:

Training about online customer communication, communication in a crisis, and the type of tools and platforms of online customer communication.

The transferable skills related to this chapter aim to educate learners on communication with the client, know how to be prepared when there's a crisis, and be able to communicate with customers. This information will help the learners know strategies, methods and tips for good online customer communication, which are the best communication tools and which apply best for their business. With the tools provided by this chapter, learners will be quick to tell what to do to maintain a good relationship with their customers through different channels.

Competences:

Identifying crises, methods of consumer communication, online communication strategies, using social media as a communication tool, understanding digital communication, online customer communication tools, reaching costumers, understanding customers, implementing various communications channels, developing a community, and building an excellent client-business relationship.

2.0 Information about each subchapter

Subchapter title: **How Small Businesses Should Adapt Their Customer Communication in a future crisis**

A short introduction to the chapter:

The COVID-19 pandemic was unexpected and affected companies in general, from large organisations to SMEs, which were the most affected. Several business sectors suffered, especially retail, travel, hospitality and services. During this unprecedented global health crisis, companies were forced to question what would be the best and most effective communication strategies to adapt.

Meaning of "Crisis" – an unexpected event that threatens your business's reputation and/or finances and public safety

Clint Fontanella stated in the HubSpot blog that there are different types of crises:

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Natural (e.g., pandemic, earthquake, hurricane)
Financial (e.g., your company can't afford to pay off its debt)
Personnel (e.g., an employee's unethical behaviour or misconduct)
Organisational (e.g., your company significantly wronged its customers)
Technological (e.g., system breakdown)

How to communicate effectively

Regardless of the type of crisis your business is experiencing, it's mandatory to have effective communication with both your internal and external stakeholders; this being said, it's recommended the following:

1. Preparation of a crisis communication plan

Even though crises regularly appear unexpectedly, organisations may prepare themselves with a crisis communication plan and a crisis management team.

2. A customer always comes first

In a general way, a crisis scenario brings up strong negative emotions. Sometimes unhappy customers may write negative comments on review sites or social media. In this case, playing the blame game is not the answer. Instead, promote a supportive and collaborative communication climate on your social media, including your company blog, rather than a defensive one.

Many articles and studies suggest that the change of corporative policy is the answer most clients prefer. Open communication with your customers will be a great problem solver that can restore the company's image.

3. Quickly and accurately communicate with the public

Do not sacrifice accuracy in favour of speed. Companies must ensure that all information released on their website, posted on their social media, or even provided to the press is as precise and accurate. The keywords are honest, open, transparent and consistent

4. Communication channels, take advantage of them

Communication with the audience using multiple channels such as text, email, customer service phone number, website or social media pages.

Some companies manage to operate by adopting different models, such as selling products online or in the case of medical appointments.

In case of changes or new service options, companies must notify their customers using whatever means of communication.

5. Social Media - a crisis communication tool

Social media is commonly used as a crisis communication tool. You can use social media to keep your customers updated on relevant information. Besides social media apps like Facebook, Instagram, Twitter and LinkedIn, you can use your company website to communicate with your

customers and employees during a crisis. Organisations use social media to communicate during crises. This is important since it allows people to stay connected and learn about events as they happen. Different crises require different solutions. To communicate with people in a crisis or situation, we need to know what kind of crisis or situation they are in.

6. Post-crisis evaluation and follow-up communication

After a crisis, it is essential to evaluate to ensure everything is OK. This evaluation should be followed up with communication to ensure everyone is aware of the situation. The intensity of a crisis usually decreases over time. After a crisis, you can look back and see how your company handled it.

What did we learn today?

What can we do to improve on our strengths?

What were some of our team's successes?

What were some of our team's challenges?

The weaknesses that were exposed were your mistakes. How are we doing now?

Next time we have a crisis, we could try doing things differently to make things easier for ourselves. If you look at what you did during the crisis and your past responses, you can learn from it and use it to be better prepared for future situations. You may need to follow up with some reputation repair and communication. If you are committed to keeping your customers or the media updated on the progress of your business recovery, then you should keep your word.

How Small Businesses Should Adapt Their Customer Communication

In 2020, businesses started using virtual communication methods more often than not. This new way of connecting with customers is likely to become the new normal in the future. The pandemic made it easier for people to communicate and work from home, but these practices can be challenging to manage because of the logistics involved.

When you communicate with your customers using multiple sources, your business will be more inclusive, making it more appealing to potential customers.

CCM is about working around different situations so everyone can get what they need. So, to keep in touch with your loyal customers, here are a few ways small businesses can adapt to their communication needs.

- **Personalize Communications**
- **Cover All The Channel Bases**
- **Rapid Response and Thorough Follow-Up**
- **Curate Your Content**
- **Heed Their Words**
- **Flexibility with empathy**

Subchapter title: **Strategies for online customer communication**

A short introduction to the chapter:

Defining digital communication is the first step.

Let's define digital communication as a starting point: Digital communication is connecting with people via online channels. This may include social media campaigns, email newsletter distribution, banner advertising, and native advertising articles. Through digital communication, businesses can reach a larger audience, share specialised messages, and build meaningful relationships.

As eBay founder Pierre Omidyar told Bloomberg Businessweek, "We have the technology, finally, that for the first time in human history allows people to maintain rich connections with much larger numbers of people."

There are several reasons why businesses launch digital communication campaigns:

To Build a brand: A brand image can be developed for a startup company or transformed for a legacy organisation, pivoting into a new direction.

To Generate awareness: Companies can reach a broad audience by showcasing their products, values, and services.

To Drive conversions: Campaigns can encourage customers to follow the funnel of marketing and purchase products online or in a store.

To Create customer experiences: Campaigns can be custom designed to create unique experiences and build brand affinity through targeted campaigns on social media, one-on-one messaging apps or live video.

To Deliver customer service: Community managers can respond to questions in real-time to solve problems, or they can follow up on satisfied customers and go that extra mile.

To Manage risk: Businesses can control damage by building a solid brand and improving the brand's reputation after an incident.

To Provide entertainment: Marketers can provide more content to their audience, such as a compelling video or a funny article.

To Educate consumers: Companies can create helpful digital content that helps their customers solve everyday problems.

Reach Audiences Through Email

Marketers can send email messages to consumers directly, where they may have received letters from family, friends, and colleagues in the past.

Launch Engaging Social Media Campaigns

Social media communication and digital communication are frequently used interchangeably. Through bite-sized textual and visual content, social media enables people worldwide to engage with friends, family, celebrities, and corporations.

Using either a brand page or groups pertinent to the community, Facebook efficiently creates a social network with active members. The founder of Facebook, Mark Zuckerberg, believes that native video would "promote meaningful social interactions," thus brands would be wise to invest in it.

Communications professionals can use popular social media platforms to build brands in different ways:

YouTube
Twitter
Instagram
LinkedIn

Career Development in Digital Communication

Recent graduates land their jobs as social media coordinators, PR agents, and digital media professionals. Additionally, they have experience working in various environments, such as publishing firms, nonprofits, governmental institutions, and advertisement agencies. New technologies that will change company communications will emerge as the digital environment continues to change. A substantial degree program can give professionals the tools to strategise, adapt, and engage online audiences in their chosen fields.

Determine who in your company is in charge of client communications to start. Is it the customer success team, customer service agents, or sales department? Choose the person who will be in charge of creating and sustaining customer relationships.

Six crucial consumer communication methods

- 1. Create an omnichannel communication**
- 2. Automate customer communication with chatbots**
- 3. Enhance new client onboarding and first-time customer communication**
- 4. Conduct regular customer satisfaction surveys**
- 5. Educate your audience**
- 6. Use proactive communication**

Choose the most effective communication method and frequency for your customers. Every consumer group has various tastes, as was already mentioned. Make sure you are familiar with your client's preferences.

Gather surveys and feedback to determine the best way to communicate with your customers. You'll get closer to effective customer communication if you follow their advice.

Handy sheet with issues to steer clear of while speaking with customers

1. Sounding trite
2. Empty promises
3. Prolonged waits
4. Uncooperative customer service agents
5. Too frequent or seldom interactions with potential customers

Subchapter title: How SMEs can improve their online customer communication support

A short introduction to the chapter:

What is the significance of online customer service?

A brand's reputation takes years to develop and five minutes to destroy. Businesses that have realised this, design their strategies differently. The importance of online customer service cannot be overstated, as the consequences of a poor customer experience are far-reaching.

Acquiring clients can be demanding for small and medium-sized businesses (SMEs). Getting a new client can cost five times as much as keeping an existing one. However, making your consumers feel appreciated and satisfied can mean the difference between bankruptcy and long-term success.

Excellent online customer service programs should concentrate on immediately addressing client complaints and exceeding their expectations by utilising the appropriate tools and methods. Businesses that use this technique can engage customers and create solid connections, in addition to reaping the other essential benefits stated below.

- **Enhance contentment:**
- **The credibility of the brand**
- **Increased CLTV**

Tips to improve online customer service

Online customer service is critical to any organisation's growth, whether a product or service. However, if you make customer service mistakes, you will be unable to provide the level of service that your clients require, and they will eventually depart.

The followings are the essential recommendations and best practices for enhancing online customer service. They will enable you to improve customer support and gain client satisfaction and loyalty.

1. **Concentrate on the customer experience (CX)**
2. **Provide real-time client service.**
3. **Use co-browsing to collaborate with your customers**

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4. Use video chat to personalise your customer service
5. Use social media to provide online customer service
6. Measure customer service metrics regularly
7. Teach your employees proper customer service techniques
8. Pay attention to consumer input

Subchapter title: **Overview of platforms and systems related to customer support and communication (examples, comparison)**

A short introduction to the chapter:

Digital transformation makes companies more capable of knowing the market, delivering quality services and products based on innovations and data intelligence. In this perspective, it is essential to know the best customer service software.

Such technologies improve the relationship with the public of interest. By the way, we know that a good interaction with the client not only makes him loyal, but also brings good insights for the next contacts.

Following we present some customer service tools:

Types of customer communication tools

Help desk software

Help desk software is a hub for managing, responding to, and tracking client contacts across several channels. Customer support teams typically use it. However, other teams, such as sales or account management, may also use it.

The following are some things to look for in help desk software:

Collaboration – Tools like internal notes help everyone involved in customer encounters run smoothly.

Productivity – By reducing manual chores such as assigning customer conversations, employees have more time to focus on servicing rather than sorting.

Reporting – Knowing where you're thriving and where you can improve will help you develop an excellent customer care plan.

Chatbot software

Chatbots automate support so visitors can access assistance at any time. When done correctly, they take over the more tedious, repetitive aspects of service, allowing your agents to focus on situations that require more attention.

The following are some qualities to look for in chatbot software:

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Customisation – With many use cases, a flexible solution allows you to cover many circumstances.

No-code alternatives — Being able to construct a chatbot without manually writing code permits you to get started faster and be more agile with your efforts overall.

Analytics – Analytics provide insights into how your chatbot is functioning and identify areas for improvement.

Call centre software

Call centre software has been developed to assist you in better managing your phone service for the benefit of both agents and customers.

With call service software, you may automatically direct calls into a queue, route calls to specific agents, allow call conferencing and create an automated callback if a call is lost.

Some call centre software features to look for include:

Automation – Tools like call routing help your team save time and connect clients with relevant people faster.

CRM integration – Knowing whom you're speaking with can make a big difference and eliminate annoyances such as repeating information.

Reporting – Average hold time and call time can alert you to inefficiencies in your process or even knowledge gaps that agents may have.

Live chat software

Customers may require immediate assistance. Though many of us consider phone assistance the best choice, there is another option: live chat. Live chat provides the same level of immediacy as phone assistance but allows agents to handle numerous conversations simultaneously, making it more customisable and less expensive.

The following are some things to look for in live chat software:

Integrations – Because chat is typically used with other tools, having it connect to other products, such as help desk software, is beneficial.

Offline alternatives - Look for tools that can function even when a live agent isn't available.

Track metrics such as response times and the number of discussions that must be sent to another channel for resolution.

Customer survey software

Customer feedback is essential for any business, and customer survey software enables you to collect information consistently and consistently.

Your most precious asset is your consumers. Most organisations are aware of this, but few take action, spending time and resources to know their customers and what makes them tick truly - their problems, hopes, anxieties, and goals.

Some survey software features to check for include:

Collaboration features – Look for the opportunity to add remarks or grant several producers access to the survey builder.

Analytics – Metrics such as average completion time and drop-off locations can provide essential information on improving your survey's effectiveness.

Design abilities – A brand-aligned survey may encourage customers to interact with it.

Customer Review Platform

Communication is not always straightforward between the client and the company. For example, many customers communicate through online product review sites to assist other customers in making informed judgments. So, as a business, you must constantly monitor evaluations on these platforms, detect trends or common problem areas, and address them as soon as possible.

3.0 Detailed Instructions for the trainer

Chapter 5

Step 1: Trainer must first become familiar with the chapter's introduction, aims and objectives and learning outcomes.

Step 2: Trainer must teach the ppt file related to the topic of Chapter 5.

Step 3: On slide 7 trainer must go briefly over the different types of crises.

Step 4: On slide 8 trainer must go briefly over the different recommendations to communicate effectively.

Step 5: On slide 9 trainer must explain to the participants the different recommendations to communicate effectively.

Step 6: On slide 10 trainer must explain to the participants the different recommendations to communicate effectively.

Step 7: On slide 11 trainer must explain to the participants the different recommendations to communicate effectively.

Step 8: On slide 12 trainer must go briefly over How Small Businesses Should Adapt Their Customer Communication and click on each icon to explain every step to the learners, pressing on the importance of each step.

Step 9: On slide 19 trainer must go briefly over the different tips for customer communication.

Step 10: On slide 24 trainer must go briefly over social media communication and click on each icon to define each social media.

Step 11: On slides 26, 27 and 28, the trainer must go briefly over Six crucial consumer communication methods, explain them and press on the importance these methods have for good consumer communication.

Step 12: On slide 31 trainer must explain the significance of online customer service and click on each icon to explain every step to the learners, pressing on the importance of each step.

Step 13: On slide 32 trainer must go over briefly the different tips to improve online customer service and click on each icon to provide explanations of each tip to the learners

Resources:

PPT:

Readings:

1. <https://www.nextiva.com/blog/customer-service-strategy.html>
2. <https://www.caflou.com/10-essential-management-tools-every-small-business-needs>
3. <https://www.businessnewsdaily.com/10624-communicate-better-with-customers.html>
4. <https://www.rmit.edu.au/study-with-us/levels-of-study/short-courses/planning-a-digital-communication-strategy>
5. https://www.emerald.com/insight/content/doi/10.1108/JSM-01-2015-0036/full/html?journalCode=jsm&utm_source=TrendMD&utm_medium=cpc&utm_campaign=Journal_of_Services_Marketing_TrendMD_1&WT.mc_id=Emerald_TrendMD_1

Exercises:

<https://www.ksl-training.co.uk/free-resources/customer-service/customer-service-training-ideas/>

Videos:

1. <https://www.youtube.com/watch?v=n7tgmDhdTJM>

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2. https://videohub.oracle.com/media/Customer+Communications+Management+for+the+Digital+Age/1_kp1vscxz

Additional material:

<https://www.trustradius.com/customer-communication-management>

<https://www.softwareadvice.com/customer-communications-mngt/>

4.0 References

1. *How Small Businesses Should Adapt Their Customer Communication This Year:*

<https://www.forbes.com/sites/forbesbusinesscouncil/2021/04/14/how-small-businesses-should-adapt-their-customer-communication-this-year/?sh=783826f355e6>

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2. Connecting with customers in times of crisis: <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/connecting-with-customers-in-times-of-crisis>
 3. 10 Tips For Effective Small Business Communications During A Crisis: <https://bizhack.com/10-tips-for-effective-small-business-communications/>
 4. Here Are 3 Quick Ways to Communicate with Customers During & After a Crisis: <https://www.getweave.com/3-quick-ways-to-communicate-with-customers-during-after-a-crisis/>
 5. 9 Tips to Build a Customer Communication Strategy (2023): <https://whatfix.com/blog/customer-communication-strategy/>
 6. Customer Communication: 6 Effective Strategies [+Tips]: <https://www.tidio.com/blog/customer-communication>
 7. Best practices for productive communication with your customers: <https://wiserbrand.com/best-practices-for-productive-communication-with-your-customers/>
 8. 5 Strategies for Effective Customer Communication Management: <https://customersfirstacademy.com/customer-communication-management/>
 9. 10 practical tips to improve online customer service: <https://www.revechat.com/blog/online-customer-service/>
 10. How to Successfully Engage With Your Customers Online: <https://articles.bplans.com/seven-creative-ways-to-engage-with-your-customers-online/>
 11. 4 ways small businesses can improve their customer service strategy today: <https://customerthink.com/4-ways-small-businesses-can-improve-their-customer-service-strategy-today/>
 12. 10 Ways Small Businesses Can Improve Their Social Media Presence: <https://digitalmarketinginstitute.com/blog/10-ways-small-businesses-can-improve-their-social-media-presence>
 13. How SMEs Can Improve Customer Relationships Online: <https://understandingecommerce.com/how-smes-can-improve-customer-relationships-online/>
 14. 15 Customer Communication Tools to Engage Your Audience: <https://www.helpscout.com/blog/customer-communication-tools/>
 15. 20+ Best Customer Communication Tools for 2022: https://www.proprofsdesk.com/blog/best-customer-communication-tools/#Customer_Review_Platform
 16. 11 Customer Communication Tools for Building Stronger Relationships: <https://www.userlike.com/en/blog/customer-communication-tools>
 17. 13 Tools Businesses Can Use to Communicate with Customers: <https://blog.fivestars.com/13-tools-businesses-can-use-to-communicate-with-customers/>

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18. Customer Relationship Management Software Pros and Cons: <https://crm.walkme.com/customer-relationship-management-software-pros-and-cons/>
 19. zendesk: <https://www.zendesk.com/>
 20. ProProfs Chat: <https://www.proprofschat.com/>
 21. Livechat: <https://www.livechat.com/>
 22. Freshdesk: <https://freshdesk.com/>
 23. Callhippo: <https://callhippo.com/>
 24. Aavaz: <https://www.aavaz.biz/>
 25. Outgrow: <https://outgrow.co/outgrow-forms-surveys/>
 26. SurveyMonkey: <https://www.surveymonkey.com/>
 27. Proprofs chatbot: <https://www.proprofschat.com/chatbot/>
 28. Botsify: <https://botsify.com>
 29. Capterra: <https://www.capterra.com/>
 30. Google Reviews: <https://www.google.com/business/>