The Customer 360 Playbook

How to Change Mindsets, Connect Silos, and Center Around Your Customer

A PART OF:

360 PERSPECTIVES

SERIES: THE

Foreword

A note from Bret Taylor

For years, I've heard business leaders discuss the need to digitally transform and achieve a holistic view of the customer. Lately, I've found those discussions to be even more urgent.

Realistically, though, it's not about being a digital company or even a digitally transformed company. Every company needs to be a customer company.

Conventional attitudes, silos, and legacy systems often stand between leaders and customer centricity. And while technology can help, that alone is not the answer. Simply applying new technology to old ways of doing things won't magically change the way your teams deliver a great customer experience at scale.

Transformation happens when leaders stop focusing internally on technology, products, departments, or systems – and recenter around their customers.

Easy to say, harder to do. We hope this playbook helps you confidently lead change.

Our work with thousands of C-suite leaders from organizations of all sizes and industries has uncovered patterns of what it takes for successful companies to get it right as they evolve to be more customer-centric.

Whether you're a CEO in financial services, a CIO in B2B tech, or another leader ready to make meaningful change, I hope this playbook helps you bring the customer closer to the center of your business.

Bret Taylor

President and Chief Product Officer, Salesforce

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You might be wondering:
What makes this playbook different from everything else on this topic?

We're offering this guidance based on what Salesforce has learned from thousands of working sessions and projects with C-suite leaders over our 21-year history. Across industries and functions, we've found the core challenges are the same – and so are the key questions to ask your teams as you drive a customer-first revolution.

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Introduction

What is customer 360 transformation and why now?

Business transformation has reached a critical inflection point.

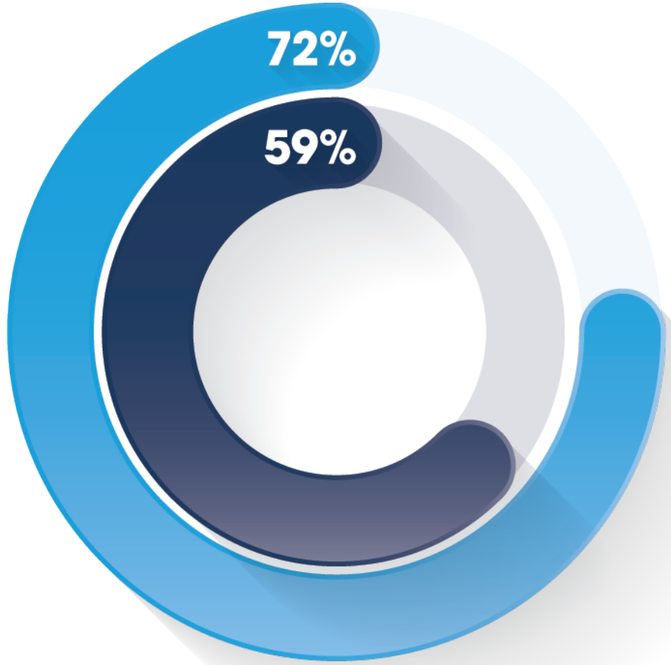
For decades, businesses competed on the ability to build and distribute the best product or service. Leaders thought, “Build it and they will come.” It made sense to put the product at the center of a business.

Today, the internet and new technologies like artificial intelligence (AI) and the Internet of Things (IoT) are turning this world upside down. In every industry, it’s never been easier to set up a new business and compete with industry incumbents.

With so many choices at their fingertips, customers now choose to spend their time and money with businesses that put them first.

New research shows that **84% of customers say the experience a company provides is as important as its products and services.**

Customers expect unity but often face silos



72% **of customers expect all company representatives to have the same information about them**

59% **of customers say it generally feels like they’re communicating with separate departments, not one company**

Salesforce, State of the Connected Consumer, June 2019.

Future-fit companies are evolving accordingly, redesigning their businesses to compete on the most important market differentiator: their ability to understand, engage, and earn the trust of their customers. These companies put the customer at the center.

Salesforce’s business has been built on the gradual evolution from the product-centric world to one in which customers demand to be at the center of your business. The Salesforce technology platform is singularly focused on enabling this. And we’ve learned one important thing helping leaders do that for the past 21 years: Adding new technology to old-fashioned, product-centric thinking doesn’t generate the change businesses really need.

Introduction

That's why this playbook is focused on what we call **customer 360 transformation – an approach that puts the customer in the center of your feedback loop and innovation cycle.**

Customer 360 transformation rallies every department, employee, and stakeholder around customers' needs.

How to work toward customer 360 transformation with this guide

The idea of hitting reset on your organization's efforts toward customer centricity may have you breaking out in a cold sweat, but the steps outlined in this guide will help you make a plan and evolve.

This playbook's five chapters will begin your journey with thought starters and practical tips.

Mindsets: Common assumptions, orthodoxies, and actions that can hold a company back or propel it forward. Ideally, mindsets evolve to put the customer at the center of the business, with priorities determined via customer listening and close-the-loop processes.

Disciplines: Customer-centric business processes that unite employees, departments, and partners to solve customer needs with the full force of the organization.

Future-proof technology investments that sense and respond to the needs of customers and employees in real time.

Chapter 1

Understand the Importance of Changing Mindsets in Your Organization

Our working sessions with leaders have made it clear: To create change, you need to change how people see the world.

Mindsets are the common assumptions, orthodoxies, and actions that both hold companies back *and* propel them forward.

Most CEOs look at their business and see two ways to change. They can renovate their existing business to drive down costs and increase productivity. That's a **renovate** mindset.

Or they can use freed-up cash to experiment with new ways of generating customer value, as if they were a startup entrepreneur – operating in a **transcend** mindset.

For established businesses, executives spend about 80% of their time in a **renovate** mindset. The company naturally remains product-centric, albeit with some innovative **transcend** programs.

Sound familiar? The big aha moment is realizing there's a third way: You can evolve your company to be customer-centric. You can shift from **renovate** to an **evolve** mindset.

RENOVATE

How do we optimize our existing business?

EVOLVE

How do we put our customer in the center of our business?

TRANSCEND

How do we create customer value in new ways?

Examples of how mindsets lead to market solutions

		Banking	Insurance	Manufacturing	Retail	Healthcare and Life Sciences	Travel, Transportation, and Hospitality
Renovate How do we optimize our existing business?	Sell or service more effectively	Streamlined banking product sales	Increased health insurance sales productivity	Supply chain-centric go-to-market, supported by efficiency through Lean Six Sigma and ERP	Discount-based loyalty programs	Accurate patient records maintained by providers	Call center optimized to maximize occupancy rates
Evolve How do we put our customers in the center of our business?	Create frictionless buying experiences	Frictionless, multi-channel banking product application, approval, and onboarding experiences	Frictionless health insurance claim experiences	Connected product data for insights	Personalized multi-channel buying experiences	Wellness journeys that keep people on the right track	360-degree view of the guest, enabling employees to anticipate needs
Transcend How do we create customer value in new ways?	Own the job to be done	AI-enhanced, automated financial coach to help customers buy a home or save for retirement	AI-enhanced experiences that promote healthy lifestyles	Open digital platforms that allow customers to collaborate and co-develop new offerings	Concierge partner that serves all of your nutrition/fashion needs	Ecosystem of providers that share data and collaborate to manifest healthy communities	Lifestyle concierge that serves a traveler's entire hospitality experience

Get started: Explore mindsets within your company

You can probably guess your own organization's mindset. Just do a quick audit of where your leadership and management team spends its time.

Most companies aren't changing how they think but are simply improving what they already do. That's not an **evolve** mindset.

You may find your leadership team is completely aligned to a transformative vision that seems like an **evolve** mindset. But do your business metrics reflect that vision? Is every employee truly aligned and **evolving** how they work? If not, the **renovate** mindset will remain the predominant force.

Use these conversation starters with peers, leaders, and team members to further explore your mindsets:

- Inside our organization, where do we see customer centricity? Who are the leaders and teams that are the most customer-centric, and what can we learn from them? What's holding us back from customer centricity?
- Who are the digital disruptors that inspire us? What are they doing differently?
- Are there teams that stick to muscle memory, rather than finding better ways to serve the customer? How might we help them evolve? How can we avoid slipping back into old habits?

Ultimately, you only need to settle on one question: How do we move from **renovate** to **evolve**?

We see one clear, actionable answer to that question, distilled from tens of thousands of customer engagements. Your company needs to learn four disciplines. Think of these as four muscles you need to build and condition.

Next, learn more about what each discipline entails – and the steps to make it a reality.

Chapter 2

Design Customer-Centric Business Processes

Your business processes are your company's habits – repeatable behaviors that enable scalable effectiveness.

In a product-centric world, these business processes optimize how you manufacture, market, sell, and service your products. In a customer-centric world, you still need to do all of that, but you also have to think about those activities from the customer's perspective.

Your goal: Make it easy for employees to make it easy for the customer.

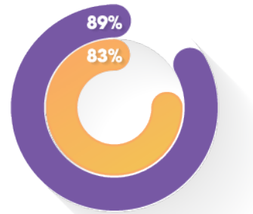
Well-designed customer experiences have never been more relevant. Here's the evidence, according to research:

- **Salespeople** – once solely focused on closing transactions – now track customer satisfaction more than any other metric.[1]
- **Nearly half of marketers** – once concerned only with driving new leads – now champion customer experience initiatives across their entire companies.[2]
- **Even leaders in information technology (IT)** now cite customer experience as their top priority.[3]

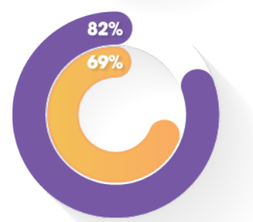
Great experiences reap great rewards, with almost two-thirds of customers willing to pay a premium for them. What's more, a standout experience with one company prompts nearly three-quarters of customers to hold other companies to higher standards.[4]

The only way to deliver those excellent experiences is to enable employees at every stage of the customer's journey.

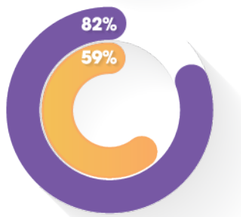
The customer experience stakes have never been higher[4]



84%
of customers say the experience a company provides is as important as its products and services



73%
of customers say one extraordinary experience raises their expectations of other companies



66%
of customers are willing to pay more for a great experience

BUSINESS BUYERS CONSUMERS

1. Salesforce, State of Sales, May 2018.
2. Salesforce, State of Marketing, December 2018.
3. Salesforce, Enterprise Technology Trends, May 2019.
4. Salesforce, State of the Connected Customer, June 2019.

Make it easy for your employees to make it easy for your customers

The heightened stakes for customer expectations mean you have to design not only the selling experience, but also the buying experience.

Think about it: Every customer interaction is an experience. You need to audit each of them and evaluate how they grow or diminish your business.

Look through the eyes of your customers and redesign what you're asking them to do – at every touchpoint.

For example, think of how Uber redesigned the entire experience of getting a cab. They looked at every area of friction and simply removed it.

No standing in the rain hailing a cab, no waiting to exit your ride to pay.

At the same time, they made it easy for drivers to find riders. This combination of improved customer *and* workforce experience revolutionized an industry.

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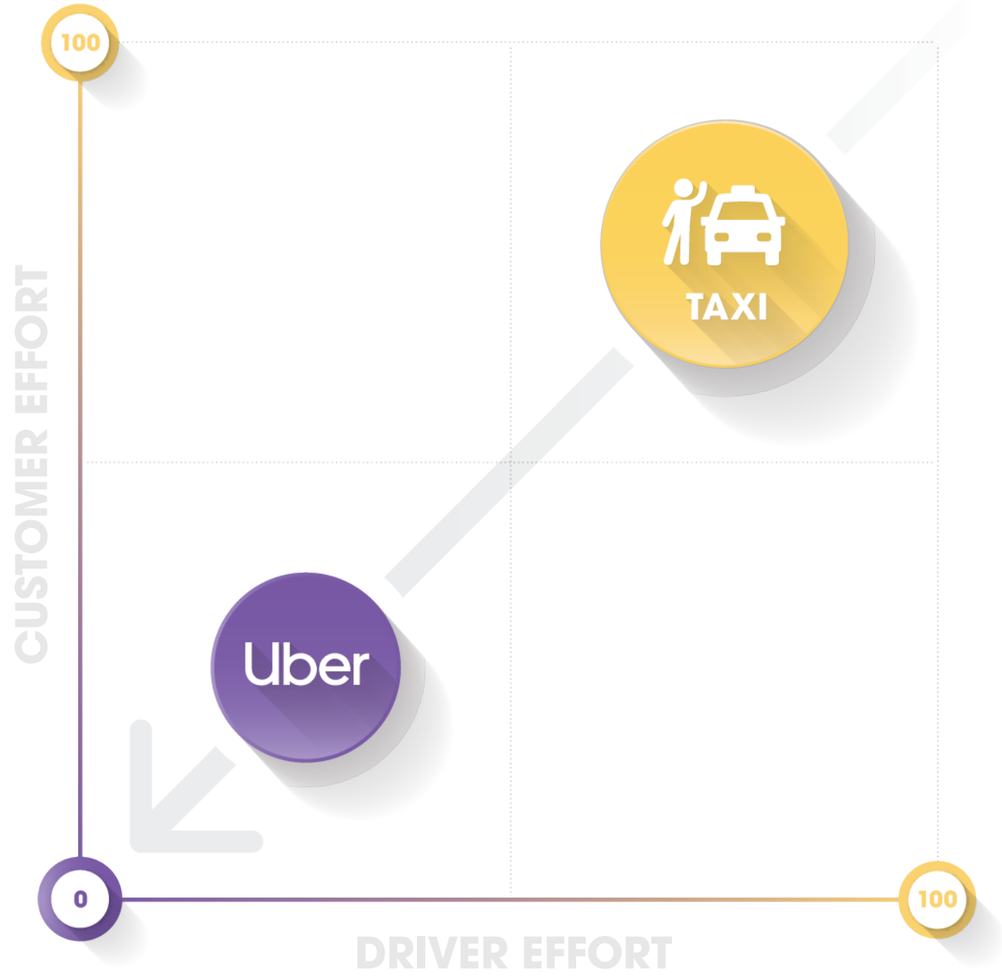


Get started: Pick one customer touchpoint

Speak to your customers, and they'll surely give you an example of an inconvenient or clunky touchpoint with your company. Bring together stakeholders from all of the teams that influence that moment to explore how you might fix it. For now, focus on that single touchpoint and the teams and time frames needed to address it.

For example, why should customers have to call you if there is an issue? Might you be able to identify the issue and proactively engage to solve it? With the right data and processes in place, your airline could move you from a cancelled flight to an alternative before you even know it's cancelled.

Put yourself in your customer's shoes and imagine what they need, when, and why. Find a way of making it effortless for them to get what they need. Together with peers in other departments, go through this thought exercise about recentering processes around your customers.

How can you move from the company-first processes on the left to the customer-first options on the right?

Move from...	To...
Supply optimization	Anticipate product demand and the customer jobs to be done
Scale through standardization	Personalized 1-to-1 journeys at scale
Transactions	Connected experiences
Transaction volumes	Lifetime value

Chapter 3

Build One Team Around the Customer

Who owns customer centricity? Ultimately, everyone does. That means collaboration must be your top priority. The only way to make real change happen is to connect silos and act as a unified team so employees closest to the end customer are empowered to create enduring relationships.

Customer-centric companies have silos, too. They have clear designations of who's doing what for efficiency. But they equip distinct departments to share, collaborate, and deliver integrated customer experiences – down to even the most junior employees.

Enable every employee to deliver the full force of the company

What happens when a customer has a service issue? They speak to the first person they get from the company, and they don't care what department the person is in.

Unfortunately, and all too often, the customer ends up having to navigate the org chart to get what they want. Employees are simply not empowered to serve the customer's needs.

Customer-centric companies think carefully about the customer experience and develop a customer-first culture to improve it.

They overlay this culture with the tools and information everyone needs to make it easy to collaborate across teams and departments in the service of the customer.

These same companies cultivate information transparency and celebrate team behavior.

Get started: Make a plan with internal stakeholders

To start to make this discipline a reality, share your goals and KPIs with peers outside your team – even those that don't normally work together.

Explore how you can help each other, and find goals you can share. Celebrate successes as a broader team as you step away from partitioned, traditional responsibilities.

Review the following list. How can you move from the department-specific approaches on the left to the customer-first set on the right?

Have you listened to all perspectives, especially from those who are on the front lines with customers every day?

Who is responsible for designing the end-to-end customer experience and where are the internal bottlenecks?

Move from optimizing by function...	To optimizing outcomes that matter to the customer...
Specialization by department	Cross-functional collaboration
Metrics by department	Shared success metrics
Rigid, hierarchical org structures	Flatter, more flexible teams
Serve shareholders	Mobilized ecosystem of stakeholders

Chapter 4

Move to the Leanest Possible Technology Stack

Uniting disparate departments is an important part of customer centricity. But it's only part of it.

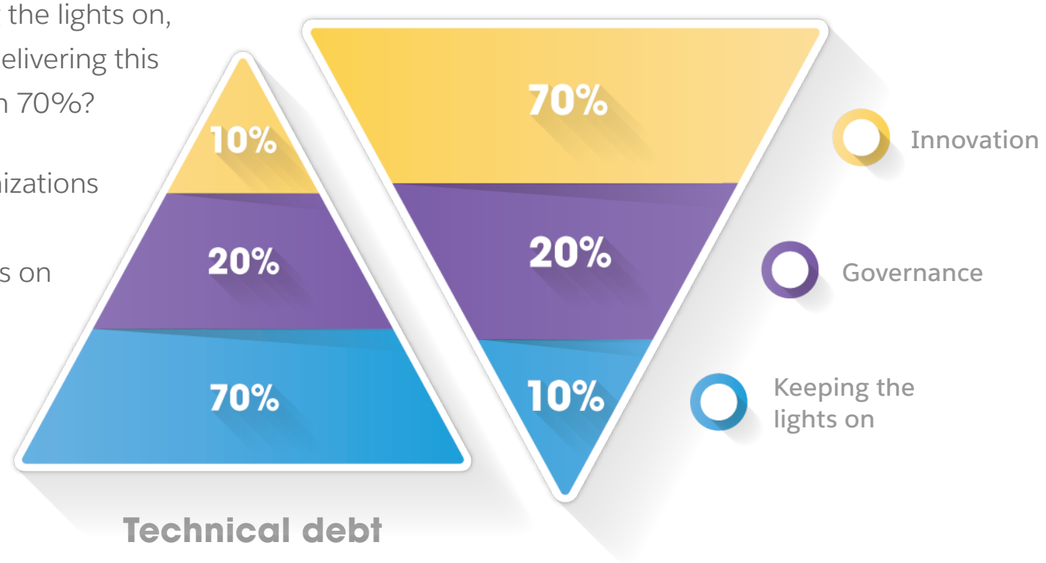
Technology generates the reach and scale you need to make customer centricity an act of business. In fact, all businesses are becoming technology companies, using digital platforms to enable more personalized customer experiences at scale.

Let's be honest though. How much of your current IT spend is focused on keeping the lights on, compared to investing in and delivering this vision? Is it 50%, 60%, or even 70%?

You're not alone. Most IT organizations are on a journey to flip the cost pyramid from keeping the lights on to investing in bigger-picture innovation.

For most businesses, this flip starts with replatforming in the cloud, typically with global, hyperscale providers.

Here, leaders develop modular architectures with reusable, modular data sets and processes. The next layer of digitization is around business processes.



An API strategy that enables an application network with massive reuse becomes a powerful part of this future-fit, lean tech stack.

This is where Salesforce focuses with a complete strategy around customer relationship management (CRM), integration, and data.

Moving away from legacy technology debt has never been more important. The role of IT is quickly evolving from managing backlogs and dealing with frustrated business partners to enabling business teams to compose low- and no-code apps in service of customer outcomes. IT leverages this leaner technology stack to experiment faster and deliver more effectively on the ever-changing needs of the business.

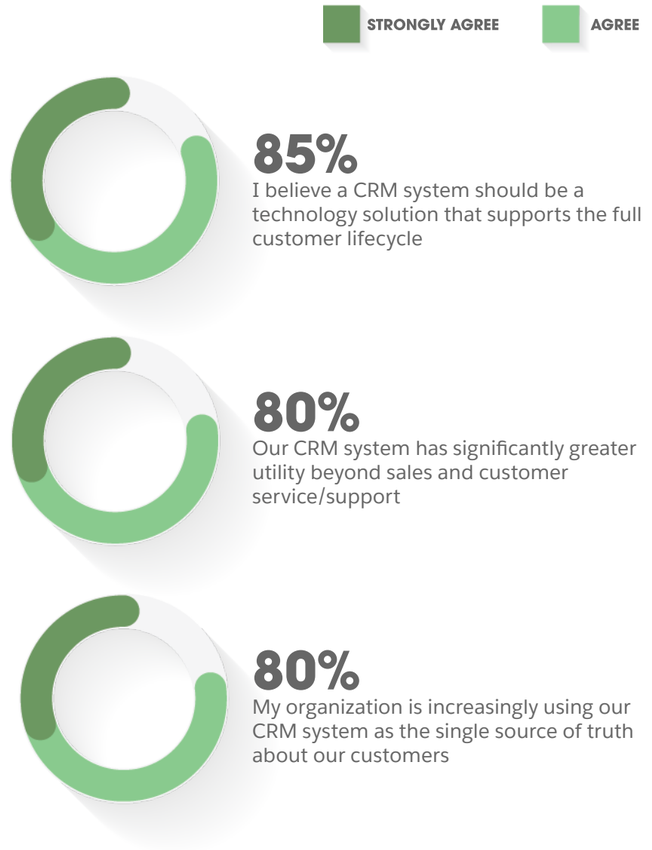
Evolving your tech stack for customer centricity

In the march toward a leaner tech stack that fuels greater customer centricity, you'll notice your CRM platform naturally playing a critical role. That's because it:

- Consolidates the number of tools needed for your workforce to do their work.
- Empowers employees closest to customers to deliver the right experiences at the right time.
- Delivers insights and recommendations, not just data.
- Makes customer data easily shareable.
- Keeps you flexible and connected in an age of APIs, IoT, and the platform economy.

Many businesses still have a product-centric architecture, with CRM used tactically, department by department. This is changing quickly, as CRM becomes the single source of customer truth, including unified collaboration tools and omni-channel customer engagement workflows and process automation.

In a recent Salesforce-commissioned study of nearly 500 business leaders, Forrester Consulting found 80% agreed that a single source of customer truth would create "significant" or "indispensable" value for their company.



Base: 484 director-level and above decision makers with responsibility for CRM strategy and technology investments
Source: A commissioned study conducted by Forrester Consulting on behalf of Salesforce, August 2019.

Get started: Empower the business with a single source of truth

While a 360-degree view of the customer is an incredible goal, it's difficult to achieve. The sheer volume of data you could include is virtually endless.

Instead of being overwhelmed by the possibilities, focus on building a clear and easy-to-read customer profile. Begin the continuous approach to building an ever-deeper view of your customer and the context for their relationship with you. Empower as many employees as possible to see this source of truth and use it to serve the customer's needs.

Talk through this "move away from" and "move to" list with your team and discuss how you can focus more on tech that improves customer experiences and leave behind not-so-helpful legacy systems.

Move from...	To...
ERP-centric	CRM-centric
Separate technical debt and innovation line items	Combined budgets focused on customer experience
Projects led by departments or IT	Projects led by customer centricity
Large releases	Smaller, more frequent releases
Steering committiees	Partner with end users

Chapter 5

Sense and Respond to Customers, Now and in the Future

You now have the world's best customer experiences and a fully aligned team, supercharged by incredible technology. For a moment, angels sing.

And then something changes ... but do you notice? Perhaps a competitor comes up with a better proposition, something breaks, or your customer simply changes their mind on what is good enough.

How do you keep up with this change? Coordinating your response is a critical discipline.

Why? Customers' expectations and behaviors will continue changing, even after you perfect internal processes and connect silos. For your digital transformation initiatives to evolve, you need to sense and respond to change better than your competition.

Create a data flywheel that fuels customer success

We have found that the best companies focus intently on earning and re-earning customers' trust.

Customers show their trust in two connected ways: They give you their money and their data.

The best way of earning more data is to analyze what you have and turn it into insights, which become the DNA of improved experiences – which, in turn, earns you more data. And so the flywheel keeps spinning as long as you deliver what the customer wants: experiences that feel as effortless as possible.

When Salesforce was founded in 1999, we offered only a small fraction of the technology we offer today. We grew into customer service, marketing, ecommerce, and beyond because our customers asked us to. Each Salesforce feature is prioritized according to demand.

Our whole business is predicated on listening and delivering. Customer feedback is the engine that drives us – and it'll help you evolve, too, for whatever comes next with your own customers.

Get started: Embed customer listening in your business

Before you commit to too many changes, ask yourself and your peers: What stories are our customers telling us? Have we listened deeply to customer feedback recently? Embed customer listening into your company's DNA to ensure transformation efforts are hyper-focused on their needs.

To prioritize where to ignite change, it's best to get an understanding of top needs for each customer persona. Here are some of the best practices Salesforce follows:

1. Create a voice-of-the-customer function. The right program will have both business-focused research leaders and a neutral reporting structure. That way, the team responsible for delivering improvements isn't also keeping score. Get feedback from customers to establish a baseline and set a single improvement goal as your starting point.

2. Invest in listening at every level. Target all personas in your ecosystem. Which customer groups experience the most pain? Which drive the most revenue? Who are your greatest brand advocates? Don't fear their feedback.

3. Integrate insights into one narrative. Tell one story behind the numbers. Just as you want to balance your listening across channels, you want to balance your data with a story. Listening tours, advisory boards, and focus groups bring color and context to scorecards and trend lines.

4. Operationalize insight reviews. Integrate customers into strategic planning, and assign an accountable owner to each metric or measurement that stems from what you learned when listening. Does the executive team plan future products or programs at an offsite or every Monday morning? Wherever planning takes place, save a seat at the table for the customer's voice.

5. Invest in intelligence and automation to drive accountability. Automating analysis and reporting saves your team valuable time. A sensing tool or machine layered on top of your qualitative feedback is one of the most effective ways to unlock insights.

6. Inspire a customer listening movement. Sometimes the team sharing customer feedback is perceived as the "bad news" team. Instead, motivate your team and your stakeholders to stay engaged and keep acting on customers' needs by recognizing results and rewarding teams that become listening champions.

7. Close the loop with your customers. Listening means you need to communicate. It's unrealistic to take action on every piece of feedback, and customers don't expect you to do everything they ask. But they do expect to hear back from you on what you are doing, what you're not able to do, and what else you need from them for a successful partnership.

Get started: Embed customer listening in your business

Designate enough time and resources to rethink your current sense-and-respond capabilities and make a change.

How can you evolve the legacy patterns on the left to the greater-value practices on the right? Get serious about uniting your marketing, sales, commerce, service, and IT teams to actually hear what customers are saying and make changes.

Move from...	To...
Periodic research reports	Real-time, data-driven insights
Big-bang rollout	Continuous releases
A few big bets	Many little bets
Culture of information as power	Reusable processes and components
Inevitable drift from customer centricity	Limited set of customer-centric platforms

Conclusion
and How to Learn More

Being a customer-centric company is no easy feat.

Yet redesigning business processes, connecting silos for customers' sake, and making the right lean technology investments to rapidly sense and respond to customer needs may be among the most impactful and rewarding challenges you'll take on in your career.

They'll also ensure that your company evolves and wins amid today's pace of change.

The urgency is real – and so is the potential.

Your journey toward customer 360 transformation starts with this playbook, but it doesn't end here.

Keep learning more with these resources:

Visit one of our Salesforce Innovation Centers.
Reach out to your account team or contact us here.

Read State of the Connected Customer.
Download the report here.

Check out the Customer 360 Online Configurator.
Visit the configurator at sforce.co/CreateC360

360 PERSPECTIVES