



# Revolutionizing customer relationships



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Zylker PowerHouse is an electronic store based out of New York. It also runs its sales online. Its products range from mobile phones and laptops to microwave ovens and washing machines. Recently, one of their customers tweeted her feedback on the customer service provided by the company.



**Novita Pareira**

**Terrible customer service**

The customer care executive was very rude. He barely made any effort to listen to my grievance. I kept telling him that the phone I ordered came without a cable and that I wanted an exchange, but he rudely asked me to opt for a return instead and offered me no further solution.

28 5 21 ↑



# Overview

With constant developments in technology, customers are more in control of their choices than ever before. The number of platforms where they can voice their praises or express their dejection is large. Many customers take to social media to express themselves, and what they say can make or break a brand.

If a customer puts up a comment (like in the image above) on any social media platform, the company's website, or any platform for that matter, it can have a terrible impact on the business. Besides, no business can run if their customers are unhappy. It is, therefore, crucial for any organization to put in extra effort to make their customers feel connected to the brand and ensure they exceed their expectations by building long-lasting, memorable relationships. This will also help in customer retention.

# What does the term customer relationship mean?

Customer relationship refers to the interactions and communication between businesses and their customers that work towards forming a strong association between the two parties. It encompasses all the aspects of the customer's experience from the point of initial contact. In order to ensure your business builds trust, it is important to maintain proactive communication and build solid relationships. Let us try to understand the different strategies a business needs to follow in order to build said relationships.

- Practice consistent and proactive communication as a priority.
- Understand what your customers value the most and empathize with them.
- Build relationships with customers through all channels.
- Use modern technology to your advantage and ensure fast support.
- Take customer feedback seriously.
- Make irresistible offers.
- Prioritize personalized relationships.
- Reward loyalty.
- Focus on customer satisfaction.
- Adapt to their pace.



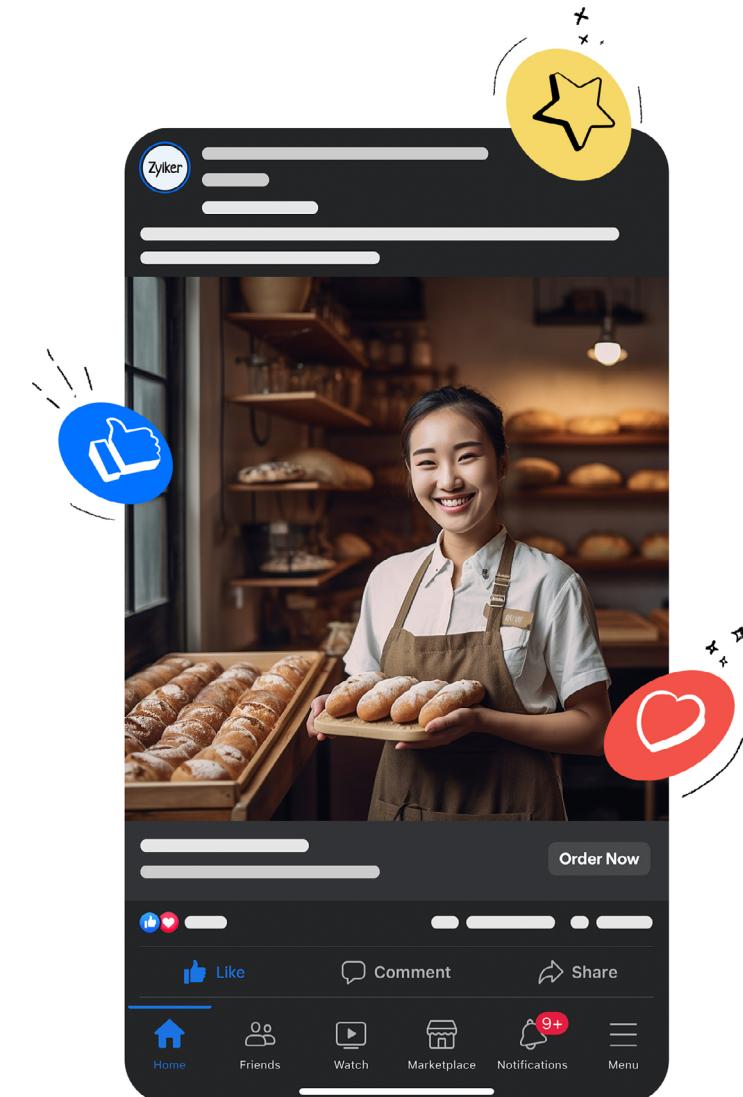
# Positive and negative relationships

Now that we understand the concept, let us look at the different categories that make up a customer relationship.

## Positive Relationships

These are usually long-term relationships built through a lot of effort. By creating a stable environment of trust between the business and its customers, there is a foundation for continuous growth in their relationship.

Zylker Bakery, located in a small suburb of Cleveland, Ohio, receives over 100 orders for cakes on a daily basis. The team at the bakery ensures each cake is delivered with a personalized note and a small package of handmade cookies or chocolates. The bakery's social media page is always flooded with great feedback on how delicious the cakes are and how lovely the service provided is. In fact, word of mouth is one of the company's best lead generating sources and customers keep coming back.



## Negative Relationships

These relationships, on the other hand, stem from a lack of trust when the customers feel their expectations were not met. It can include poor service quality, delayed responses, and the like.

A customer of an interior design company posted a tweet expressing her frustration at the company's poor service.



Sanaya Payne

If you have any enquiries, reaching out to the team at Zylker Interiors can be quite frustrating. I sent them a few emails with details I needed to finalize for the design plan for my kitchen. However, they took days to reply each time and it delayed the entire project.

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# Types of relationships

Type	Description	Example
Transactional	This type of relationship is usually a one-time or a short-term one. It is mainly until the transaction is made, following which there isn't an ongoing relationship.	A customer makes a one-time purchase from a retail brick and mortar store.
Functional	A functional relationship between a business and a customer develops when the customer continues to make purchases from the business.	A customer's relationship with e-commerce companies like Amazon.
Affiliative	This relationship prevents a customer from looking for alternative options as they feel strongly connected with the sales person and have built a deep sense of trust that they will receive the best service.	A customer who was initially looking at three different cars (from different companies), finalizes one following their continuous positive interactions with one company.
Strategic	A strategic relationship is when a business understands its customers' expectations and weighs it with their performance. They then make amends accordingly.	A software company builds its products and tailors them based on its customers' requirements.

# Importance of customer relationships

A good customer relationship is essential as it helps in the long-term success of your business as customers feel more secure and connected with your brand. This can lead to repeat purchases as well as more referrals. Positive relationships with your customers can result in:

## **Increased sales**

Trust is an essential ingredient in a good business-customer relationship. The more a business works towards building that trust, the higher the chance of buyers listening to them and believing in the solutions they offer.

## **Reduced customer attrition**

When a business keeps its promises to its customers, tries to understand them, offers good incentives, and maintains a healthy relationship with them, there is a higher chance of the buyers being loyal. This helps increase repeat purchases.

## **Invaluable marketing**

When your customers are happy with your service, there is a chance they might talk about it to others or discuss the same on social media. They might also recommend your company to others. This helps your business save a lot of money on marketing.

## Increased loyalty

You may have heard the phrase “a happy customer is a loyal customer.” It is important for a business to build customer relations and keep their customers happy as that drives loyalty. In fact, according to a Microsoft study, 96% of responders said superior customer service is crucial for them to remain loyal to a company.

In another study, the results of which were discussed in an article titled **“Why is Customer Relationship Important for Every Business?”** (published on loginradius.com)

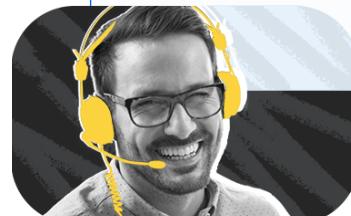
it was found that one in three of the 15,000 customers surveyed would step away from a good brand after just one bad experience, while 92% would completely abandon a company after two bad experiences with them.

Building relationships with customers is one of the best ways to ensure your brand is a success. In fact, how your customers feel about your brand can make or break your business. It is therefore crucial that you work towards building relationships with the customers, not just until the deal is closed, but to retain them for future sales as well.

# Customer relations

## VS Customer service

While the traits of customer service and customer relations sound similar, they are actually quite different from each other. Let us look at some of the differences between the two:



Customer service	Customer relations
Customer service is reactive	Customer relations is proactive.
It is about how you tailor your products or services to ensure customer success.	It has more to do with feedback, satisfaction, and the like.
<b>Examples:</b> <ul style="list-style-type: none"><li>Answering questions that customers may have about products or services.</li><li>Listening to customers' complaints and helping them find solutions.</li><li>Helping customers return purchases.</li></ul>	<b>Examples:</b> <ul style="list-style-type: none"><li>Coming up with ways to improve customer experience from the moment they show interest in your brand.</li><li>Building a great team to implement the best practices to improve the customer experience.</li><li>Ensuring availability to customers.</li></ul>



# Customer relations and AI

A personalized experience is always bound to go a long way in gaining a customer's trust and strengthening your relationship with them. However, understanding your customers and gaining their trust is not a single day's task. It takes a lot of time and energy to accomplish. Today, artificial intelligence (AI) is being used across industries to simplify tasks and reduce human errors. So, why not use this technology to ease the process of building customer relationships as well?

“For centuries, people have worried that new technologies—from the mechanical loom to the internal combustion engine—would replace human labor and render us superfluous. And for centuries, these fears have proven misplaced as new technologies have increased our productivity and created new jobs.



**Daniel Susskind,**

Author of the book *A World Without Work*

The integration of AI into customer relationships has ushered in a new era of personalized and efficient human interactions. With AI-powered chatbots and virtual assistants, businesses can resolve customer queries and free up valuable human resources for more difficult tasks.

They can analyze vast amounts of data, and uncover patterns and insights that will help them tailor their offerings and marketing strategies to individual preferences to boost customer satisfaction and loyalty.

Companies can also proactively offer their customers relevant products and services. They can also gauge customer sentiments and address concerns promptly.

For instance, a logistics company can use AI to help representatives determine which emails from customers are to be prioritized. Another example is a clothing line using AI to understand its customers' most preferred mode of contact while promoting a seasonal discount. While a software company can use AI to determine the sentiments of their customers in emails.

These are just a few examples of how AI can be used by companies in building relationships. Let's look at a scenario to understand this better and to identify Zoho CRM's role for the same.

**Scenario:**

Zylker PowerHouse, the electronic store we discussed earlier in the book, has been trying to improve its customer interactions after a number of negative posts and comments were put up on various social media platforms, severely affecting their business. They realized one of the main contributing factors to this was the lack of a personalized touch to the service they offered.

# Challenges

Some of the challenges that the business faced included:

## Behavioral patterns

Given their large client base across so many years, they struggled to clearly understand their customers' behavioral patterns, which affected their interactions.

## Cross selling

Sales reps found it difficult to keep track of products sold together on various occasions, which could have helped them suggest similar products to new customers.

## Assigning prospects

Understanding the different types of prospects and creating assignment rules based on that was taxing.

## Too many emails to read

Each sales rep receives hundreds of emails from customers. Going through each of them and determining the intent before following up was proving to be extremely time consuming.

## Providing the best experience

Determining the best time and mode to contact the customers is key to a smooth followup. However, the team at Zylker PowerHouse was challenged with trying to understand the same and constantly failed.

## AI and Zoho CRM

Zoho's AI tool, Zia, has the capabilities to help Zylker PowerHouse ease the process of building customer relationships by simplifying communication with prospects and customers.

Using Zia's Recommendation tool (which is CRM's self-learning tool), the company can now understand the behavioral patterns of their customer base. It uses previous purchase details, their search history, and other data to recommend the right product for the right user at the right time.

While cross selling is important for a business to increase revenue and build engagement, the sales reps at Zylker PowerHouse struggled to keep track of all products sold together as it involved a lot of manual effort. Using Zia's Similarity Recommender, they can now gather that data instantly. This helps create solid relationships and eventually boost revenue.

The screenshot displays the Zoho CRM interface for a campaign. At the top, there are two tabs: "Overview" (which is selected) and "Timeline".

**Campaign Details:**

- Campaign Owner: Amalia Burrows
- Type: Webinar
- Status: Active

**Similar Campaign:**

- Post pandemic readiness
- \$ 6000
- 60% / 20%
- Similarity score 40

**Why is this campaign similar?**

- Type is webinar
- Expected revenue > \$ 5000
- Budgeted cost is between \$ 2000 to \$ 8000
- Recipient count > 100

**Performance Metrics:**

Total Count	180 Leads	Actual Cost	Revenue	In Pipeline
200 <a href="#">View Stats</a>	20 Contacts	\$ 4,200.00	\$ 35,000.00 From 1 closed Deals	\$ 200,000.00 From 4 Open Deals

**Campaign Information:**

[HIDE DETAILS ^](#)

Campaign Owner	Amalia Burrows	Type	Webinar
Campaign Name	Pandemic readiness	Status	Active
Start Date	Apr 14, 2020	End Date	Jul 15, 2020
Expected Revenue	\$ 6000	Budgeted Cost	\$ 7000

Despite having automated the process of carrying out regular tasks such as sending emails, updating fields, and similar actions, the team at Zylker PowerHouse would spend a lot of time identifying the tasks that need to be automated and creating workflow rules or macros for the same. This used to take a lot of time which could have otherwise been used to make sales. With Workflow and Macro Suggestions in Zoho CRM, the team can cut down on time and effort as Zia offers suggestions on well-executed workflows or macros to automate processes.

Zia suggested Workflow for Contacts

It looks like a few of your routine activities could be automated. Save your sales team 10 minutes of work with Zia workflow suggestions.

```
graph TD; WHEN((WHEN)) --> RecordAction[Record Action Create]; CONDITION((CONDITION)) --> Rule[This rule will be executed for all contacts.]; Rule --> InstantActions[Instant Actions]; InstantActions --> Tasks[Tasks]; Tasks --> ScheduleDemo[Schedule Demo];
```

Create as Workflow

Zia

Today, Tuesday

**Suggestion**  
Save your sales team hours of work with Zia workflow suggestions.

**Attention**  
50% of 6 Potentials created in the last 1 week(s) are not touched by any workflow rule(s).

**Attention**  
100% of your Leads are without any email follow up for the past 7 days.

**Attention**  
100% of your Contacts are without any email follow up for the past 7 days.

**Attention**  
75% of your Potentials are without any email follow up for the past 7 days.

The screenshot shows a user interface titled "Zia Recommendation". At the top, there are five tabs: "Prediction", "Zia Recommendation" (which is underlined, indicating it is active), "Zia Reminder", "Zia Notification", and "Zia Voice". Below the tabs, the title "Zia Recommendation" is displayed. A descriptive text follows: "Zia analyses and learns from every single process you execute inside CRM. She is capable of making recommendations/suggestions to improve the way you work." Underneath this text are two settings sections. The first section is labeled "Workflow Suggestion" with a green toggle switch to its right. The second section is labeled "Macro Suggestion" with a green toggle switch to its right.

Assigning prospects became a breeze, too. Sales reps at the company are assigned customers based on various criteria such as their geography, and type of product or service that they required. These criteria were set through rules that the team at Zylker PowerHouse created.

However, now, with Zia's Owner Assignment Suggestions, the task is simplified as it draws patterns from the rules and offers suggestions for a suitable rep, while also taking their threshold into consideration.

**Region based allocation**

@Leads

Description

### Create Rule Entry

Apply this rule to

All Records

Records matching certain conditions

Assign record to

Category

Users Select Users

Users matching certain conditions

Zia suggested user

Would you like to check user availability before assigning?

Yes

No

Followup Task

+ Add Task

Save Rule Entry Cancel

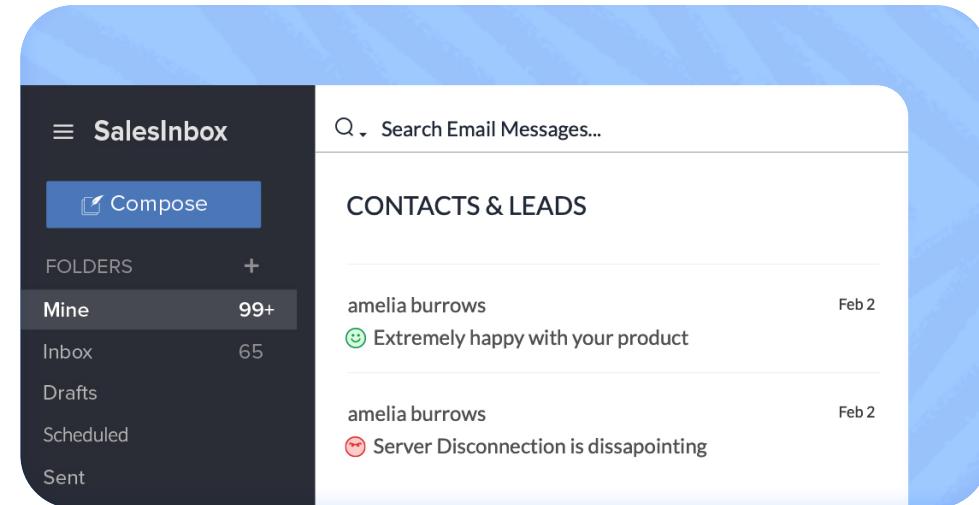
**User pattern determined by Zia ⓘ**

Users: All Users More

Pattern 1	Users
<b>IF</b> Industry is IT <b>AND</b> Region is A <b>AND</b> City is New York <b>AND</b> Bill amount greater than 10000	<b>Users</b> Peter peter@somecompany.com  <b>User Count: 1</b>
<b>Pattern 1</b>	<b>Users</b> Peter peter@somecompany.com James james@somecompany.com  <b>User Count: 3</b>

One of the most common modes of communication at Zylker PowerHouse is email. These emails can include customer feedback, transactions, customer requests, campaigns, and similar correspondence.

Using Email Intent, the reps at Zylker PowerHouse will be able to determine the underlying purpose of each email, which can help to simplify customer interactions. With other features such as Email Sentiment and Emotion Analysis, the reps will also be able to understand the sentiment and determine the emotions within the emails.



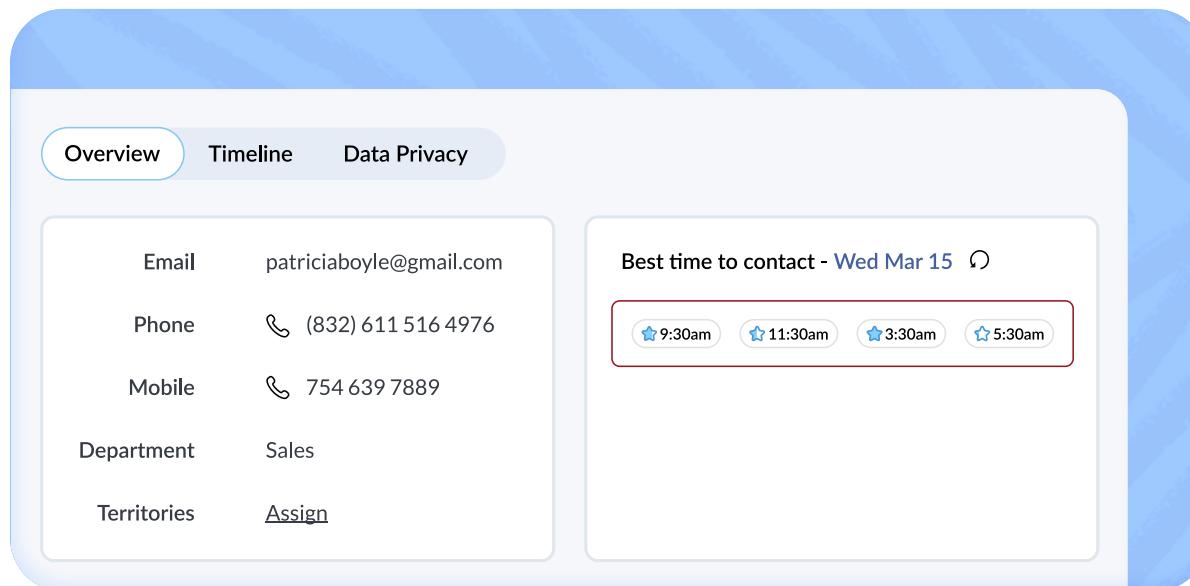
Emails						
Mails	Drafts	Scheduled	Compose Email	ALL		
Subject	Sentiment	Emotion	Intent	Date	Source	Sent By
Re: Welcome to Waved!  george.hampton@zylker.com		Gratitude	Others	5:09 PM	Individual	Harriet Nicholson
Re: Welcome to Waved!  george.hampton@zylker.com		Discontentr	Complaint	5:07 PM	Individual	Harriet Nicholson
Re: Welcome to Waved!  george.hampton@zylker.com		Happy	Others	4:55 PM	Individual	Harriet Nicholson

The screenshot shows the SalesSignals feed. At the top is a header with search, filter, and notification icons. Below is a list of activity items:

- Patrick Jane (The StartUp Hub) - Pending Tickets (9)
- Patricia Boyle (Zylker Corp) - Too many issues (Mar 26)
- Charles Stone (Sample) - Thank you (Dec 30, 2019)

The team at Zylker PowerHouse also used to spend a lot of time composing emails. Coming up with catchy subject lines to gain the customers' attention always proved to be challenging. By enabling Zia's Email Subject Line Suggestion, the team won't have to rack their brains trying to come up with something catchy.

Once the emails are crafted, contacting customers at the most suitable time for them is crucial. The sales reps at Zylker PowerHouse could never be sure about every customer's preferences. Understanding the best mode to contact them or what the next best action to prescribe should be, was also challenging. Zia's Best Time to Contact and Next Best Experience, could help resolve this for prospects, customers, as well as for deals.



The screenshot shows the Zoho CRM interface under the 'Setup' section. On the left, a sidebar lists various categories like General, Users and Control, Channels, Zia, and Communication (which is highlighted with a red border). The main content area is titled 'Best Time to Contact' and includes tabs for 'Email Intelligence'. A red box highlights the 'Best Time to Contact' section, which contains two toggle switches: 'Call' (on) and 'Email' (on). Below this is a 'Reminder Settings' section with a toggle switch for pausing notifications every day between 01:00 PM and 02:00 PM. At the bottom right of the main content area is a button labeled 'Click here to Deactivate Best Time to Contact'.

For Zylker PowerHouse, like any other business, it's important to stay on top of their customers' data. The team used to spend a lot of time and effort constantly looking through their CRM account trying to find the information they required. With Ask Zia's conversational interface, the team can now get answers regarding any data inquiries on their CRM system with great ease.

# Conclusion

Through various examples, we have seen that a personalized experience goes a long way in strengthening the relationship between a business and its customers. Understanding the customers' pain points and catering to their needs is crucial for any business as it helps build relationships and eventually increase revenue. AI's role in customer relationships is undeniably transformative and embracing this technology with a customer-centric mindset will surely enable organizations to unlock new levels of personalization, efficiency, and customer satisfaction.

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