



Smart Customer Engagement:  
How to Build Meaningful  
Business Relationships  
Through Personalised  
Messaging



# What You'll Find Inside

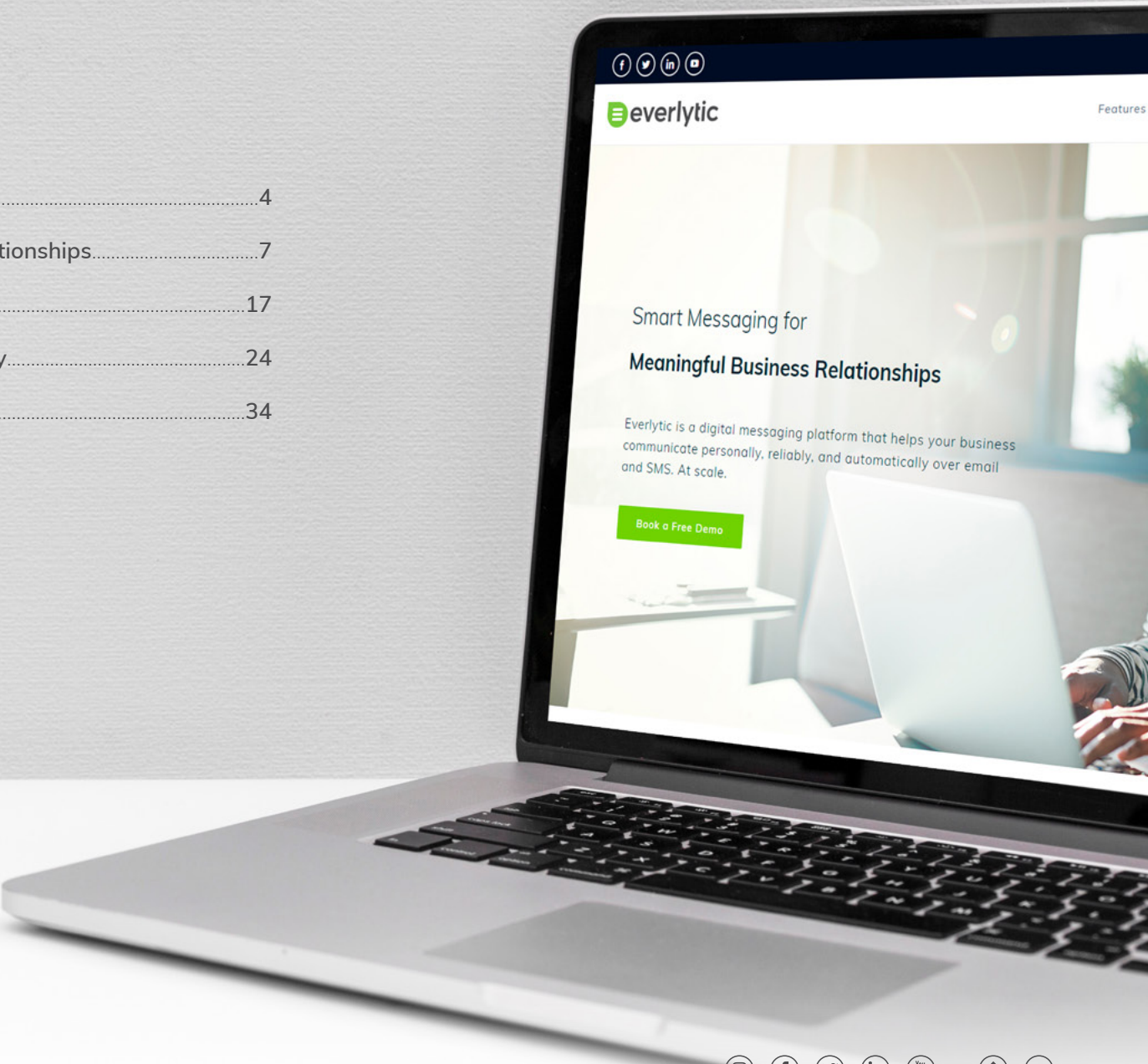
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# Introduction

Business landscapes are becoming increasingly competitive. Customers are inundated with messaging – in their inboxes, on their phones, through their social media channels and when they turn on the radio, TV, or browse YouTube.

If you want to build meaningful business relationships with your customers, you need to consistently communicate with them without being intrusive. You need to be truly customer-centric, which is only achieved when you have the data to understand who your customers are and what they care about, coupled with personalised, effective messaging.



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## Part 1

# The Role of Personalised Communication

Thanks to new technologies, digital interactions with customers today can be:

**Customised**

**Low-Friction**

**Frequent**

Companies are building deeper relationships with customers than ever before, and one of the key reasons for this is their ability to maintain constant and open channels of communication.







# How Well Do You Know Your Audience?

The first rule in marketing is: know your audience. But do you have the data to identify what content will resonate with your target audience? With the right tools, you not only better understand the people you're communicating with, but you can also create smart, personalised messages that can be delivered at scale.

Personalised messaging has multiple key benefits:

- 1 You can connect with your customers quickly and effectively
- 2 Customers who believe they're understood and heard tend to be happy, repeat customers
- 3 When you deliver on-point messaging, you're sending trust signals that lead to customers choosing to spend their money with you
- 4 You're building and maintaining relationships – which also leads to sales

The best benefit of all? Each of the above points have one key outcome: increased profits.

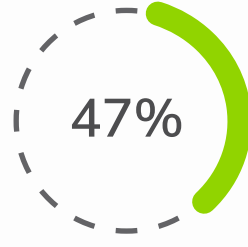
# Did You Know?

Individual customer stakeholders who see supplier content as tailored to their specific needs are 40% more willing to buy from those suppliers. ([Harvard Business Review, 2015](#))

A green circular progress indicator that is 86% full, with a dashed line indicating the remaining 14%.

86%

of South Africans feel that the "From" name on an email matters. ([Everlytic 2019 consumer research](#))

A green circular progress indicator that is 47% full, with a dashed line indicating the remaining 53%.

47%

of people open an email based solely on the subject line. ([business 2 community](#))

A green circular progress indicator that is 93% full, with a dashed line indicating the remaining 7%.

93%

of companies see an uplift in conversion rates from personalisation. ([Econsultancy](#))

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## Part 2

# Connected Strategies that Boost Business

Technology has changed the way businesses communicate. The result is a business phenomenon that Harvard Business Review contributors and co-authors, Nicolaj Siggelkow and Christian Terwiesch, call Connected Strategies: the ideal way to build business relationships.

At its core, a connected strategy is the result of businesses having a deep understanding of their customers and the ability to quickly and effectively communicate with them.

In many cases, if communication channels like email and SMS are used effectively, a business can address a customer's needs the moment they arise. In fact, if they understand each customer's position in the buying journey, current challenges, and how the company's solutions address these challenges, they may even solve them sooner.

The ability to send a customer the right information at the right time needs to be earned. Your customer must trust you and want to hear from you. This requires consistent, relevant, and personalised communication.





# Out with the Old, in with the New

Many businesses have not yet embraced the customer communication opportunities that technology presents. Siggelkow and Terwiesch call these 'Buy what we have businesses'; companies that wait for customers to come to them.

These businesses work hard to provide high-quality offerings at competitive prices. But they base their marketing strategies, content, and even their operations, on the assumption that they'll engage only fleetingly with their customers. As a result, they aren't building long-term relationships that enable them to know who their customers are, what they care about, and what their challenges are.

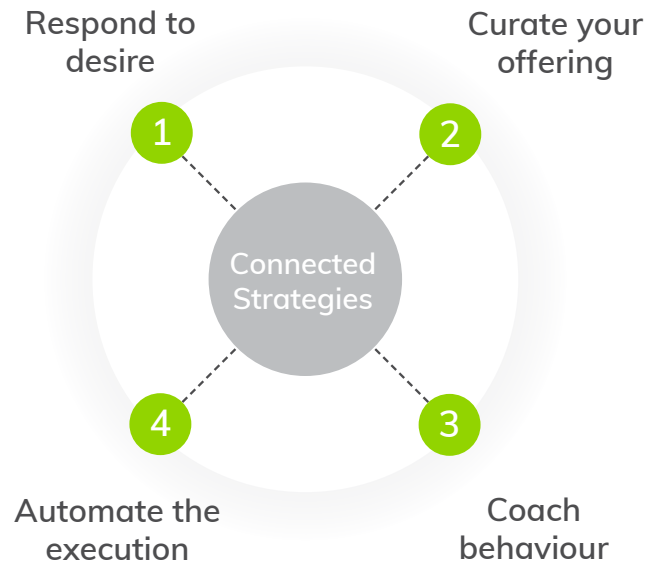
Remember, when a business understands its customers and what they care about, it's not just the business that wins – it's their customers too. Their needs are being addressed. They're receiving content that's insightful and meaningful to their lives or businesses. And they feel like they are being heard and supported.



# Matching Customers to Strategies

There are four **connected strategies** that can help improve a customer's experience with your brand and help them build a strong relationship with your business.

They are:



By implementing one or all of these connected strategies, you can boost operational efficiencies, lower costs, and dramatically improve the overall experience that your customers have with your business.

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## Connected Strategy 1

# Respond to Desire

This strategy is for customers who enjoy being in the driver's seat. The customer requests a product or service from you, and you need to provide it as quickly and seamlessly as possible. It's an operational strategy: fast delivery, minimal friction, flexibility, and precise execution.

To deliver an experience that responds to clients' desires, you need to listen carefully to what customers want and make the buying process as simple as possible. For most customers, the less energy they have to expend, the better. Speed is critical in a lot of these situations.

When your customers interact with you, ask yourself:

- 1 How many of your customers (and potential customers) value how quickly they receive your product or service?
- 2 How easy is it for them to interact with you or place an order?
- 3 How streamlined is your process?

Address these and your customers are more likely to return.

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## Connected Strategy 2

# Curate Your Offering

The curated offering strategy is all about getting actively involved in helping customers earlier in the buying journey. This is typically after customers have figured out what they need, but before they've decided how to fill that need.

Think about a customer who comes to your website. They've googled a challenge or question that your solution can potentially solve, they're looking for additional information, and comparing various service providers.

They're aware that they need a solution, but they haven't decided what that solution will look like yet. At this stage, you can offer a variety of channels for customers to opt in for more information. These can include:

- A high-value download that requires personal contact details to access,
- A 'tell me more' or 'contact me' button, or even
- Via a chat bot.

Whichever channels you choose, the result is the same: Taking the opportunity to convert anonymous browsers into known prospects that you can now communicate with.

## Connected Strategy 2

### Curate Your Offering (cont.)

According to Siggelkow and Terwiesch, when executed properly, a curated offering not only delights customers, but also generates efficiency benefits for your business. It does this by steering customers towards products and services that you can easily provide.

Keep this in mind when building your database, because when communication channels are open, your chances of repeat sales, up-selling, and cross-selling improve. Emails and SMSs are an excellent way to build relationships – but it all begins with capturing the details you need, so you can offer solutions specific to customers' needs.

So, ask yourself:



Do you have mechanisms to build an opt-in database?



How regularly are you communicating with your database, and what data are you extracting from them?



How well do you know your customers?



Are you able to personally recommend solutions as the need arises?

Address these to engage customers who value advice but still want to make the final decision.





## Connected Strategy 3

# Coach Behaviour

The third connected strategy is known as Coach Behaviour and occurs when you can proactively remind customers of their needs and encourage them to take steps to achieve their goals. Again, this requires a strong communication strategy and an existing relationship, as it works best with customers who know they need nudging.

To effectively implement a coach-behaviour approach, you need to receive information constantly from your customers so that you don't miss the right moment to call them to action.

To understand your customers' needs, combine **these three things**:

- 1 Information that they've previously shared with you
- 2 Data that you've collected from observing the behaviour of similar customers
- 3 Regular feedback from your customers via surveys

To coach behaviour, ask yourself:



What does the customer want to achieve?



What has the customer done or not done up to this point?



How can we enact behaviours that will get our customers closer to their goals?

Supporting your clients through this process will help guide them further down the sales funnel.

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## Connected Strategy 4

# Automate the Execution

This last strategy allows you to meet your customers' needs before they've even become aware of them. Customers authorise you to take care of something, and from that point on, you handle everything. Strong trust, a rich flow of information with your customers, and the ability to use the data you collect to anticipate what your customers need is essential for this strategy to work.

Automating your email and SMS messaging with technology like [Everlytic's automation workflows](#) enable you to create a smart, interactive journey once and let it handle the rest.

The Internet of Things and wearable devices make automatic execution possible, but it's not the best solution for all problems or customers. This is because people differ in the degree to which they feel comfortable sharing data and in having the companies serving them act on that data.

Breaking a customer's trust at this level could mean losing that customer - and possibly many other customers - forever.



# Choosing your Strategy

Given that companies are likely to have customers with different preferences, most firms need to create a portfolio of connected strategies, requiring them to build a whole new set of capabilities. One-size-fits-all usually won't work.

## Which Connected Strategies Work for Which Circumstances?

Connected Strategy	Description	Key Capability	Works Best When	Works Best For
Respond to desire	Customer expresses what he / she wants and when	Fast and efficient response to orders	Customers are knowledgeable	Customers who don't want to share too much data and who like to be in control
Curated offering	Firm offers tailored menu of options to customers	Making good personalised recommendations	The uncurated set of options is large and potentially overwhelming	Customers who don't mind sharing some data but want the final say
Coach behaviour	Firm nudges customer to act to obtain a goal	Understanding customer needs and ability to gather and interpret rich data	Inertia and biases keep customers from achieving what's best for them	Customers who don't mind sharing personal data and getting suggestions
Automatic execution	Firm fills customer's need without being asked	Monitoring customers and translating incoming data into action	Customer behaviour is predictable and costs of mistakes are small	Customers who don't mind sharing personal data and having firms make decisions for them

Source: [Harvard Business Review](#)

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# Choosing your Strategy (cont.)

Once you've chosen your strategy and have built effective communication channels between your organisation and your customers, maintaining those connections is essential.

Individual customer journeys that form the basis of strong relationships in businesses go through cycles of four stages:

- 1 Recognise:**  
The customer becomes aware that they have a need
- 2 Request:**  
They research various brands and solutions before choosing to engage with a specific company
- 3 Respond:**  
The customer has an experience with your brand that results in a sale

It's in these stages that companies learn from existing interactions and shape future ones. To transform stand-alone experiences into long-lasting, valuable relationships, ongoing engagement is critical.

Keep this mantra top of mind: *The best customer is a repeat customer.*







## Part 3

# Aligning Your Organisation

It's difficult to build strong, sustainable relationships with customers if your internal relationships aren't equally strong. For your customers to trust you and feel that they know you (including your values and what you stand for), the messaging they receive must be consistent, whether they're reading an eNewsletter, are on the phone to a call centre, or having a face-to-face catch-up with their account manager.

While it's important to focus on values and your company culture, for the purposes of this white paper we will focus on the (connected) roles of marketing and sales.



# Marketing

Marketing's role is anything and everything that generates interest in a company's present and future products and services.

To achieve this mandate, the marketing department needs to know who its target audience is and what the current marketplace is interested in or struggling with. This information allows them to educate, inform, persuade, or even invite responses from customers and prospects.

In other words, it's the job of marketing to open and maintain discussions with customers. Within this context, every communication or touchpoint with a customer or prospect is an opportunity to build a relationship.

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# Marketing (cont.)

Here's a secret that all great marketers understand: People respond emotionally to what they see, hear, feel, and think if the messaging addresses a need, concern, or challenge. Simply, people respond to content that speaks directly to them.

If you understand your customer and you have an open channel of communication that you're leveraging to have the right conversations, then you're building a powerful relationship with your customer base.

So, what can marketers do to create a positive impression?



Ask the right questions



Generate meaningful messaging



Communicate consistently



Engage in dialogue, both in-person and online

Marketing's job is to increase the visibility, credibility, and name recognition of a brand in the marketplace. This builds trust and helps salespeople to deepen the relationships that marketing has initiated. This can lead to more deals and help the business achieve its revenue goals.



# Sales

So, what is sales' role in the world of relationship building? First, the sales team is often the direct beneficiary of marketing's success. Marketing identifies who in the target audience is open to exploring a business relationship and builds a communication platform that speaks regularly and directly to those individuals.

Sales, on the other hand, is responsible for building more direct and proactive relationships on the foundations that marketing has laid. Sales teams focus on helping customers make positive buying decisions, and to achieve this, they typically need to follow **these seven steps**:

- **Step 1** Demonstrate a customer-centric philosophy
- **Step 2** Engage with the customer to assess their specific needs
- **Step 3** Ensure that they accurately understand their customer's needs
- **Step 4** Demonstrate solutions that match the identified needs
- **Step 5** Answer questions and address objections
- **Step 6** Ask for the order
- **Step 7** Assure new customers that they're making a sound decision







## Sales (cont.)

In the previous section, we spoke about the importance of a repeat customer, and this is where the alignment between sales, marketing, and the entire organisation becomes so important.

The sale is not the end of the process. Once the sale is complete, the business needs to deliver the solution and provide exceptional customer service. Unfortunately, this is often where the entire cycle stops, with organisations missing a critical opportunity to maintain – and build – on the relationship they’ve just developed with that customer.

This is where marketing plays a role again. By keeping channels of communication open, you’re not only continuing to collect data, but you can send your customers valuable insights that are meaningful to them, and – when the time is right – specific solutions to their challenges. This is the heart of a strong business relationship.

Even if the sale isn’t made, if the salesperson’s demeanour matches what the customer has come to expect from your brand, they may give their permission for your business to stay in touch with them. The open channels of communication will continue.

# The Importance of Customer-Centricity

There are two areas that could derail your ability to build a strong relationship with your customers:

- 1 Misalignment within your organisation, and
- 2 Lack of customer-centricity

## Misalignment Within Your Organisation

We've spoken about how marketing and sales work best together, but most companies say that their marketing and sales departments are not aligned. Sales and marketing departments tend to work in silos.

Even if you have a strong company culture and valuable messaging, this will result in your customers receiving mixed messaging, or at the very least, not experiencing a uniform and consistent relationship with your organisation.

## Lack of Customer-Centricity

According to the Harvard Business Review, businesses have been trying to adopt customer-centricity for almost two decades – with poor results. A CMO Council report reveals that 14% of marketers say that customer-centricity is actually the hallmark of their organisations, and 11% believe that their customers would call them customer-centric.

Despite everyone's agreement that customer-centricity is essential, these stats reveal that it's much harder to put into practice than expected.

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# The Importance of Customer-Centricity (cont.)

So, where do you begin? Here are **three tips** that we recommend:



**Place your customer at the heart of your business's value proposition.**

If everyone in your organisation believes that the customer comes first, the way they communicate with customers and address their needs will reflect that.



**Support your employees.**

Happy employees who feel heard and understood will naturally treat customers better. If they care about your organisation, they'll care about your customers.



**Work towards real, measurable alignment across the company.**

If everyone is on the same page, they'll all speak the same language. This will ensure that every touchpoint your customers experience will be familiar. Familiarity builds trust and trust builds relationships.



## Part 4

# How to Build a Powerful Communication Strategy

We've outlined how important it is to consistently and authentically communicate with your customers if you want to build a strong relationship with them.

Here are eight key elements to keep in mind when developing your communication strategy.

# How to Build a Powerful Communication Strategy (cont.)

## 1

### Exceed Expectations

Too many companies over-promise and under-deliver. In some cases, this is because of misalignment within the organisation: Sales and marketing are promising one thing, but the production team that needs to deliver on the promise is either unaware of what's been guaranteed or knows it's not possible.

Alternatively, businesses make promises simply to close the deal, even if they know they're unlikely to deliver on time.

Since the best customer is a repeat customer, this is a poor strategy. Instead, stick to the cliché: Under promise, and over deliver. A customer who is expecting a solution in three weeks but receives it in seven days will be delighted. A customer expecting a solution in seven days but receiving it in nine days will be dissatisfied and unlikely to buy from you again.

Alternatively, if you use SMS or email to keep your customers informed on the progress of their orders, ensure your operations are flawless.



# How to Build a Powerful Communication Strategy (cont.)

2

## Ask for Feedback

Communication channels shouldn't be a one-way push. Invite customer feedback or questions to show them you care and are listening. This is also an excellent way to gather valuable data.

Customer feedback helps you hone your messaging according to your customers' specific needs so that you can find the best solutions to their problems. The better your offering meets their needs, the more your business will grow.

It's key to listen carefully to comments and to respond promptly, whether you've received a compliment or a complaint. This is because receiving negative feedback can also be changed to a positive experience if you respond quickly and decisively. In fact, many of the most loyal customers started out disgruntled but were converted because of how well their problem was addressed.





# How to Build a Powerful Communication Strategy (cont.)

3

## Stay Connected

In an Inc article, serial entrepreneur and author, Andrew Griffiths, [shared this story](#):

*"I had a lawyer for many years who taught me a lot about engaging with clients. Every month or so, I would receive a letter with an article that was very relevant to me, ripped out of a magazine or newspaper, along with a personal note from my lawyer, saying something along the lines of 'I saw this and thought of you, hope you find it interesting and helpful."*

*Cheers - Tom."*

*"I was always nicely surprised when yet another note arrived, and they were always unexpected. And most importantly, I was extremely grateful. My lawyer made me feel valued as a client, he was interested in what I did and he cared enough to take the time to actually find and read an article, cut it out and forward it to me, with all of the hassle associated with posting a letter."*

**The lesson?** Take the time to share content that's relevant to your customers – it helps them feel valued and supported.

A cup of dark coffee in a white cup on a white saucer, and a small potted plant with bright green leaves in a white pot, both on a light-colored surface.

## How to Build a Powerful Communication Strategy (cont.)

Today, technology has made it far easier to connect with your customers. Instead of cutting out and posting articles, you can reach thousands of people at the click of a button. But there are some rules to building meaningful connections.



First, you need to be genuinely interested in your customers. Take the time to get to know them before you send any communications.




Second, your goal is to connect in positive ways by sharing valuable, customer-centric insights, advice, and solutions with your customer base.



Finally, with so many channels available to connect with customers, it's important to know what channels they're using so you can engage them where they are most comfortable.

How you connect with your customers marks the difference between successfully building relationships – or failing to do so.






# How to Build a Powerful Communication Strategy (cont.)

## 4

### Focus Beyond the Sale

Share relevant deals, specials, and solutions with your customer base, but only after you've built a relationship with them, and once you know what's relevant to them specifically. If you're only making contact to sell something, you're far less likely to achieve the success you're looking for.

Offer real value in your communications and you're creating a long-term customer who looks forward to hearing from you.



# How to Build a Powerful Communication Strategy (cont.)

5

## Follow Up Offline

Great marketers study their customers. They understand them. Through careful research, they determine why their customers love them and what it is about their offerings that customers respond to.

To do this, data needs to be collected and real, follow-up conversations need to happen. Typically, it's sales that are having those conversations – which is why it's so important for sales and marketing to be on the same page.

Consider this: When you discover why your customers say yes to you or your competitors, you have the knowledge you need to generate results and create sustainable growth in your market.





# How to Build a Powerful Communication Strategy (cont.)

6

## Don't Spam People

Too often, brands scare off followers and email subscribers by simply being too spammy. Rather than overwhelming consumers with marketing information, focus on providing interesting or useful information. Followers will naturally want to learn more about your brand if they find your content interesting.

Inboxes are flooded with a barrage of emails and newsletters. If you want yours to stand out, it needs to be so good that your customers don't only read it, they share it as well.



# How to Build a Powerful Communication Strategy (cont.)

7

## Customers Are People

Treating your customers like people may sound obvious (since your customers are people), but when you're communicating with them digitally, it's surprisingly easy to forget.

Even if you're sending thousands of emails or SMSs, ensure each one is personalised. First names are important, but so is segmenting your database into separate audiences. If you have customers in the Agri and health sectors, for example, send two different mailers. If, within your Agri sector, you have maize and cattle farmers – send them separate vertical-specific mailers. The more personalised, the better.

A Dynamic Content feature expands on this, enabling you to create one email with different dynamic sections. This means you can show different content to different segments of your database, without creating multiple different emails. When sending emails in bulk, the goal is to be as personalised as possible, while still creating one template that can reach thousands of users.

The right tools can help you achieve this.





# How to Build a Powerful Communication Strategy (cont.)

8

## Align Your Goals with Customer Needs

Your goal isn't to send an email – it's for someone to read it and engage with your brand and business. To achieve this, you need to understand what your customers are looking for.

For instance:

- Do your customers want daily updates and deals?
- Are they looking for insightful content that will help them achieve success for themselves or their businesses?
- Have they signed up for a service but require valuable information to make the most of their sign-up?

These are all areas you should consider when building your communication strategy. You're a guest in your customer's inbox or on their phone – make sure you're a welcome guest.



## Part 5

# The Everlytic Difference

Based on 2018 data from [Smart Insights](#), email marketing is still ranked as the most effective marketing channel, beating social media, SEO, and affiliate marketing.

With the right technology in place, email is a powerful behavioural communication channel that can totally alter the relationship your brand has with its customers.

Personalised recommendations and other automations can turn a customer's fleeting flirtation with your brand into a lucrative, long-term buying pattern.

It's for these reasons that businesses want a reliable, easy, effective, and compliant way to communicate with their employees and customers securely and at scale.

Visit us at [www.everlytic.co.za](http://www.everlytic.co.za) or [click here](#) to request a demo.

# The Everlytic Difference (cont.)

## Everlytic offers an easy and convenient way to:

- Develop **good business** relationships
- Earn **more revenue**
- **Thrive socially**
- Enjoy a **holistic solution** that provides your business with the tools to successfully enable growth

## Solutions That Meet a Variety of Needs

In our experience, businesses that can benefit from our solutions either:

- **Don't have the tools** to effectively communicate with both internal and external stakeholders;
- **Need** to build more personal and **strategic messaging**;
- **Require** a means to build stronger **business relationships**; or
- Are working with **slow and frustrating** legacy or **manual communication** systems that don't offer analytics, automation or personalisation.

Without the right tools, bulk communication attempts can be time consuming, limited in terms of reporting, and ineffective.

The risks include IP addresses being blacklisted or customers unsubscribing; compromising future communications or worse.

# The Everlytic Difference (cont.)

## Making the Most of Your Customer Base

Many businesses are sitting with a wealth of contacts but don't have the capabilities to make the most of them.

With the right tools, it's quick and easy to create and distribute powerful, personalised, trackable, and attractive messages:



Unlock the **full potential** of your current database / CRM



**Understand your market** better through analytics and reporting tools



**Create relevant and engaging** email and SMS messaging



**Enjoy the rewards** of building strong business relationships



**Have direct access to a local support team**, knowledge base, and a dedicated Account Manager for Enterprise clients



Make **data-backed** decisions



**Drive new sales**, nurture prospects, and retain existing customers



# The Everlytic Difference (cont.)

## In the Absence of Strong Communication Tools:



Many businesses **don't have a clear understanding** of what content drives sales



**IPs are blocked** and communications aren't delivered



**Limited insight** into the type of content that engages your audience can lead to disengagement and unsubscribes



Businesses **waste time** creating multiple different emails customised for different audiences rather than optimising it with smart dynamic content

# The Everlytic Difference (cont.)

## The Digital Messaging Platform for You

If you're looking for the peace of mind of having the right solutions in place and confidently communicating with your audience on a large scale through an attractive, dynamic and trackable solution, connect with us.

We follow a four-step process to ensure we deliver the best solution for your needs.

- **Step 1: Get in touch**  
Tell us about your business needs and pain points
- **Step 2: Solution**  
Sign up for the most fitting solution
- **Step 3: Support**  
Receive onboarding support and training
- **Step 4: Launch**  
Start your smart-communication journey

We'll give you a digital messaging platform that allows you to send strategic, personalised communications at scale, with local support, and no extra cost for automation. Plus, our reputation team oversees and manages the optimisation of all email delivery.

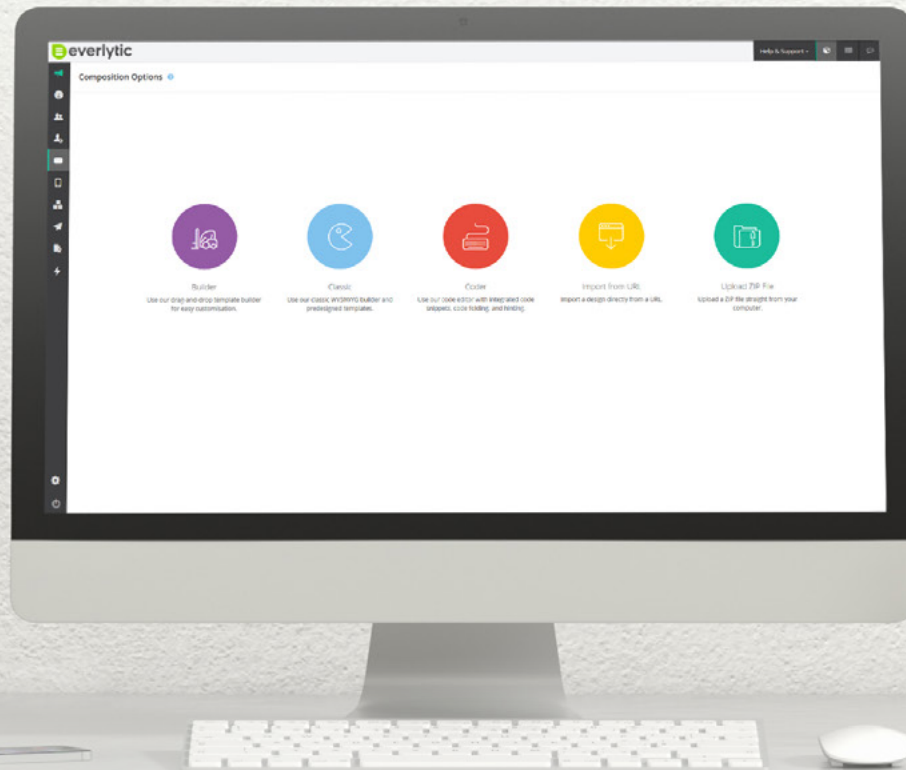
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# The Everlytic Difference (cont.)

To learn more about the tools Everlytic can provide to help you build meaningful business relationships, reach all your customers, and implement more personal, strategic messaging, visit [www.everlytic.co.za](http://www.everlytic.co.za).

Hundreds of brands use Everlytic, including Old Mutual, Comedy Central, Computicket and many more. Our customers are delighted with the effectiveness, ease of use, and the support that our solutions and teams offer. With an impressive sending volume of about four billion emails a year (and growing), Everlytic stands proud as a world-class South African email and SMS messaging platform, recognised and endorsed by leading industry experts.



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