



ruby[®]

How 2020 shifted customer experience trends for 2021

2020 changed us all. In 2021, business owners will need to prioritize personal connections with customers while ensuring their teams have the support they need to deliver empathetic and proactive customer service.

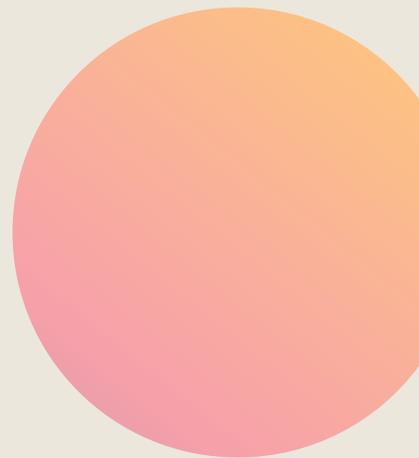
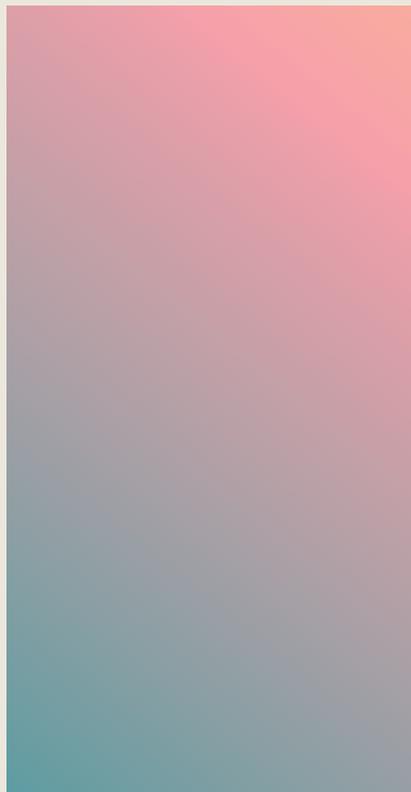


TABLE OF CONTENTS

2020: THE YEAR THAT CHANGED EVERYTHING **03**

Convenience is king
The phone call is back
Chat is a must

CUSTOMER EXPERIENCE TAKES THE LEAD **07**

Your homepage is the new Main Street
Developing personal connections quickly

CREATING AN ENVIRONMENT FOR SUCCESS **09**

The voice behind the phone (and keyboard)
Supporting staff to prevent churn
Technology enabling human-to-human connection

4 WAYS TO GROW YOUR BUSINESS IN 2021 **12**

Answer the phone
Meet customers where they are (hint: online!)
Communicate proactively
Make it personal

2020: The year that changed everything

New technologies and customer trends rise to the surface every year, but the year 2020 really broke the paradigm. From the COVID pandemic and social justice uprisings to the enormous societal shifts facing business owners and employees, 2020 was a year of obstacle after obstacle.

“2020 has shown the importance and value of human connections,” said Ruby CEO, Kate Winkler. “Even though we couldn’t perform business in person, the personal connection customer’s crave didn’t go away—quite the opposite in fact. The businesses that survived and thrived found ways to deliver on that expectation in new ways.”

For this report, we’re taking a close look at the customer service trends that emerged this past year and how business owners can stay ahead of customer expectations in 2021.



84%

84% of customers say the experience a company provides is as important as its products and services – up from 80% in 2018.¹



Beyond run-of-the-mill advances in technology and the expected uptick in digital adoption by consumers, this year brought with it the unexpected impact of a global pandemic. With brick-and-mortar stores and physical office locations largely shuttered for at least portions of the year, the way we conduct business was severely impacted.

Business owners were required to adapt to new ways of serving their customers, all while building workarounds and contingency plans to keep themselves, their employees, and their customers safe and operating within the new health standards.

¹ Salesforce, “State of the Connected Customer: Third Edition”, 2019

IN THIS REPORT, WE REVEAL:

- The most telling statistics from a review of the past year of doing business
- Insights from leading customer service experts
- Helpful advice for business owners looking to grow their business in 2021



Convenience is king

This year solidified customers' demand for personalization, speed, and ease-of-use when interacting with businesses remotely through the phone or online.

88%

of people expect a personalized experience from businesses in 2020.²



"Customers who never even considered digital experiences in the past became almost exclusively digital shoppers this year. Whether it was ordering a drive-through order via an app or pulling up for curbside pickup at the grocery store, customers leveraged the digital experiences offered in big ways. Companies had to understand their customer's overall journey, not just how to order on the app but then how to identify those customers, deliver to them safely and seamlessly, and earn their business again.

This deep dive into understanding the customer's real-life journey was what led to fast turnarounds and impressive digital transformations. Customers now expect brands to respond to their needs in faster, more understanding ways. And customers won't be going back to the "old way" of doing things anytime soon. Customers are valuing how they're saving time and still getting what they need.

Brands should be looking at ways to provide what customers expect in more contemporary ways. This might mean evaluating what is still done "the old way" and look for ways to modernize that experience for convenience, safety, and ease!"

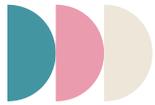
Jeannie Walters

CEO, EXPERIENCE INVESTIGATORS AND CX SPEAKER



² Walker Information, "Customers 2020: A Progress Report"

Just as Zappos revolutionized customer experience with the move to free shipping and returns, curbside pickup and delivery services have now brought a level of convenience to consumers they won't soon forget—and the ripple effects are already being felt across all industries. Customers are demanding faster and faster response times, as well as options for connecting with a business. If a business isn't available right away, most customers will call, web chat, or email the next business they find on the search results page.



90% of consumers rate an “immediate response as important or very important when they have a customer service question.”³

Customers in 2021 will demand responsiveness from businesses and they'll also look for proactive communication to feel secure and safe doing business with a company.



The phone call is back

COVID wreaked havoc on our normal day-to-day schedules. Consumers are now conducting business and shopping at different hours. With commute times all but erased and parents balancing homeschool duties with new work-from-home routines, business owners are experiencing upticks in call volume into the evenings and weekends with hardly a time to take a breath.

With so many changes affecting our hours, procedures, and other factors related to handling our day-to-day business, people have a lot more questions for companies prior to choosing to purchase. The result? A massive upswing in the number of phone calls businesses are receiving. AT&T reported a 35% increase in cellular calls in 2020 and that voice calls have remained high throughout the day and into the weekends.⁴

“Voice is the new killer app,” said Chris Sambar, AT&T’s executive vice president of technology and operations. “It’s been a real surprise.”

As afterhours availability normalizes in the customer psyche, business owners will need to decide how to continue to support this communication channel while also finding time to work on their business in 2021.

Since more than 90% of consumers expect a brand to offer some form of self-service support, IBM Watson predicts that phone support will soon become a backup channel for when self-service options fail.⁵

³ HubSpot Research, “Consumer Customer Support Survey, Q2 2018”

⁴ New York Times, “The Humble Phone Call Has Made a Comeback”, 4/9/2020

⁵ HubSpot, “12 Customer Service Trends That HubSpot Reps Will Be Watching in 2020”

Chat is a must

Though the phone may have recaptured our collective attention, the internet has by no means been quiet. Internet traffic was up between 50% and 70% in 2020 as work, school, and how we conduct business moved online.⁶

And as consumers moved online, their expectations around responsiveness did as well. As customers demanded quick answers around hours and safety precautions, companies that had previously implemented chat on their website quickly saw their interactions climb. Drift, a conversational marketing & sales tool that supports website chat, reported a 79% increase in conversation volume in spring 2020 and a 77% increase in captured leads.⁷

“Patients should be able to reach us through whatever channel they choose—phone, email, text messaging—and connect with someone who represents our practice, at any time. [Before chat] when people visited the website, regardless if they were referred by another doctor, a friend, or a Google search, we had no means of engaging with them. We could track them and send them ads, but in order to get them in the door and be able to help them, we needed to obtain their contact information.

[With chat] we got the actual transcript of every chat, showing us exactly what people were concerned about or what their questions were. The transcript would also give us a visitor’s IP address and the link they clicked on to find our website. We could see if they were coming from Instagram, Google, Yelp, and so on. That has been very helpful in honing in on where our marketing resources go.”

Dr. Dovi Preho

PRERO ORTHODONTICS



Beyond capturing more potential business, adding chat to your website could also have an impact on your search ranking. In 2021, Google will roll out its “Page Experience Algorithm” which measures “aspects of how users perceive the experience of interacting with a web page.”⁸ This means your website is now a critical factor in how Google determines where you appear in search results.

For businesses looking to stay competitive while also meeting customer expectations, website chat is on its way to becoming the top customer experience trend in 2021.

Customers are 38% more likely to buy from a company with live chat support⁹

⁶ Forbes, “COVID-19 Pushes Up Internet Use by 70%”, 5/25/2020

⁷ Drift, “The Covid Crisis is Transforming the Way We Communicate With Buyers”, 5/19/2020

⁸ NeilPatel.com, “Google’s New Algorithm: Page Experience”, 2020

⁹ Crazy Egg, “Best Live Chat Software”, 2020

CUSTOMER EXPERIENCE TAKES THE LEAD

Your homepage is the new Main Street

Brick-and-mortar stores and service-based business locations experienced were faced with one, or all, of the following in 2020:

- Close physical location(s) and move all business digital
- Open in a reduced capacity and/or operate under modified business hours

Regardless of the choice, a significant decrease in foot traffic was the result. Whereas customers used to walk-by store locations or drive themselves to a physical location to do business in-person, all forecasts and outlooks are pointing to this type of in-person interaction not returning in full force for quite some time, if ever.

The digital experience is now the human experience.

In light of these shifts, business owners spent most of 2020 rushing to accommodate the move to virtual interactions. It's not enough to just have a website and answer emails, though. Websites need to be mobile-friendly, easy to navigate and set up to solve customer's questions when they visit a site. Adding a website chat is one way to help visitors get their questions answered fast while providing a great experience—something Google will now be keeping a close eye on.



“Consumer expectations are at an all time high, both in B2B and B2C. With the introduction of product-led growth and the prevalence of the self-serve business model, your website needs to do double duty—both educating your prospects about your products, and also converting them into paying customers. Those that do this well are able to surprise and delight their customers as well as provide a sense of belonging.

When a prospect or customer engages with your online content, especially your website, they are immediately looking for clues that they are in the right place. Relevancy and personalization are now table stakes. Companies who take the time to invest in their segmentation and then build relevant go-to-market experiences for their target markets will see the benefits of higher engagement, conversion and retention.”

Tamara Grominsky

VP OF STRATEGIC GROWTH AT UNBOUNCE



Post-COVID, 59% of consumers care more about customer experience when they decide what company to support or buy from. Customer experience will dictate purchasing in 2021. In 2021, if your business does not care about customer experience, you will lose them when you need them most.¹⁰

Developing genuine personal connections (quickly!)

They say it takes a few seconds for people to form their first (and often lasting) impression of a person or company. This is exactly why it's so critical for business owners to prioritize those first-touch interactions that happen with customers. Whether it's walking into a physical office or storefront, or the greeting someone receives when staff answers the phone—that first impression can mean the difference between building a genuine, personal connection or losing an opportunity for new or continued business.



“As customers evaluate what is most meaningful to them, customers expect a more personalized, authentic experience from businesses. Customers also care more about how companies operate—not just the product or service they’re selling. With that, I think we’ll continue to see a move towards measuring and improving quality in 2021, as this is no longer a differentiator but table stakes in retaining customers.”

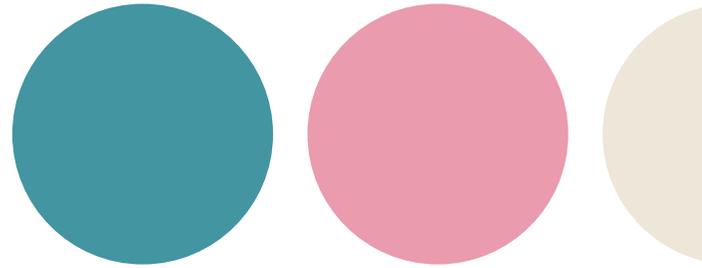
Stacy Justino

DIRECTOR OF CUSTOMER HAPPINESS AT [WISTIA](https://www.wistia.com)



¹⁰ Customer Think, “2021 Customer Experience Trends and Tactics”

CREATING AN ENVIRONMENT FOR SUCCESS



The voice behind the phone (and keyboard)

When customers are not in person and able to read body language and non-verbal cues, customer service representatives must be able to articulate a genuine and helpful tone by way of their voice and/or the way they articulate in written chat transcripts.

In a recent article on Forbes¹¹, **Blake Morgan—a Customer Experience Futurist**—said,

“Instead of focusing solely on the technology solutions they offer customers, brands first need to build trusting, thoughtful relationships. Thoughtfulness comes from having a customer-centric mindset where everyone is obsessed with providing the best service and solutions for customers. That expands to a thoughtful culture towards employees where they feel valued and have the tools they need to do their jobs. In those cultures, employees at every level know how their work impacts customers and the overall goals of the company. Thoughtfulness is built through a systemized leadership development program that internally trains future leaders to continue the customer-centric mindsets and culture. Customer experience isn’t all about the customer. It actually starts by focusing on employees and creating a cohesive culture. Culture is the most overlooked piece of customer experience strategy.”

¹¹ Forbes, “5 Trends Shaping the Future of Customer Experience in 2020”

¹² Walker Information, “Customers 2020: A Progress Report”

Customer experience will overtake price and product as the key brand differentiator.¹²



Supporting staff to prevent churn

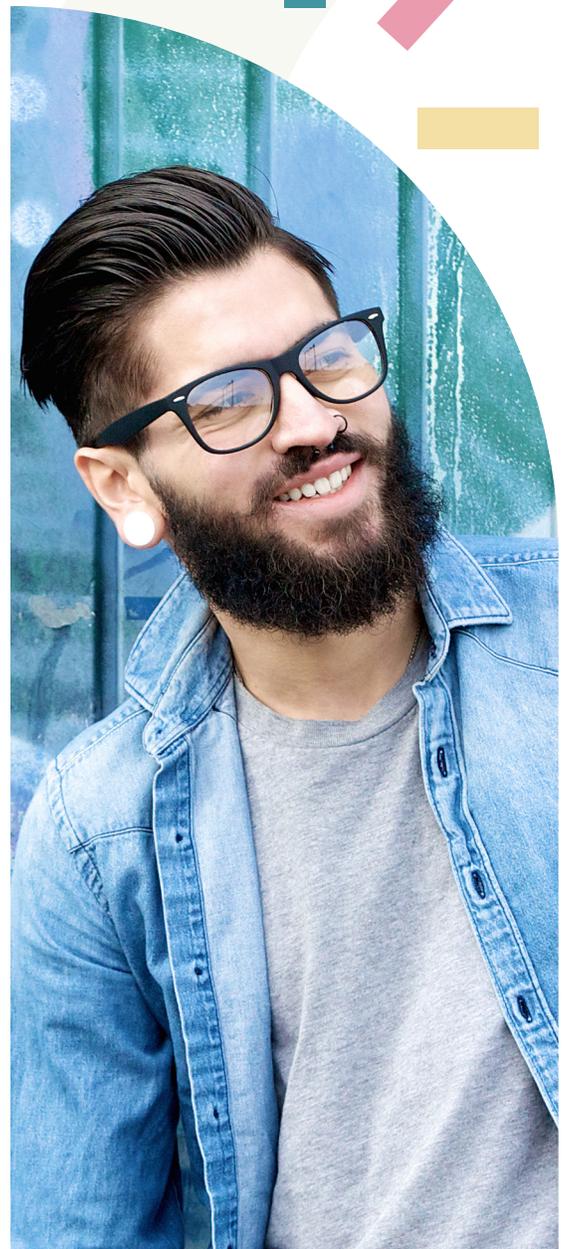
2020 left all of us feeling burnt out and that has major implications for small businesses. Many small business owners are the sole employee and face significant financial hardship or closure when they're not able to meet customer expectations due to personal or professional burnout. Those that have the benefit of employees aren't immune, however, as employee burnout can mean churn, more demands on existing staff, resulting in a downward spiral.

As we move into 2021 with customer expectations around responsiveness only increasing, it will be critical for business owners to find ways to support themselves, and their staff, when it comes to delivering service.

"2020 led to the rise of EMPATHY—always the most important underpinning principle of the relationship between a business and its customers. However, as we move into 2021, the employee experience has become as prominent as the customer experience. The way we treat our employees will reflect the way they treat our customers. In 2021, the companies that continue to put their people first are the ones who will succeed as the world recovers."

Ian Golding

CCXP, GLOBAL CUSTOMER EXPERIENCE SPECIALIST



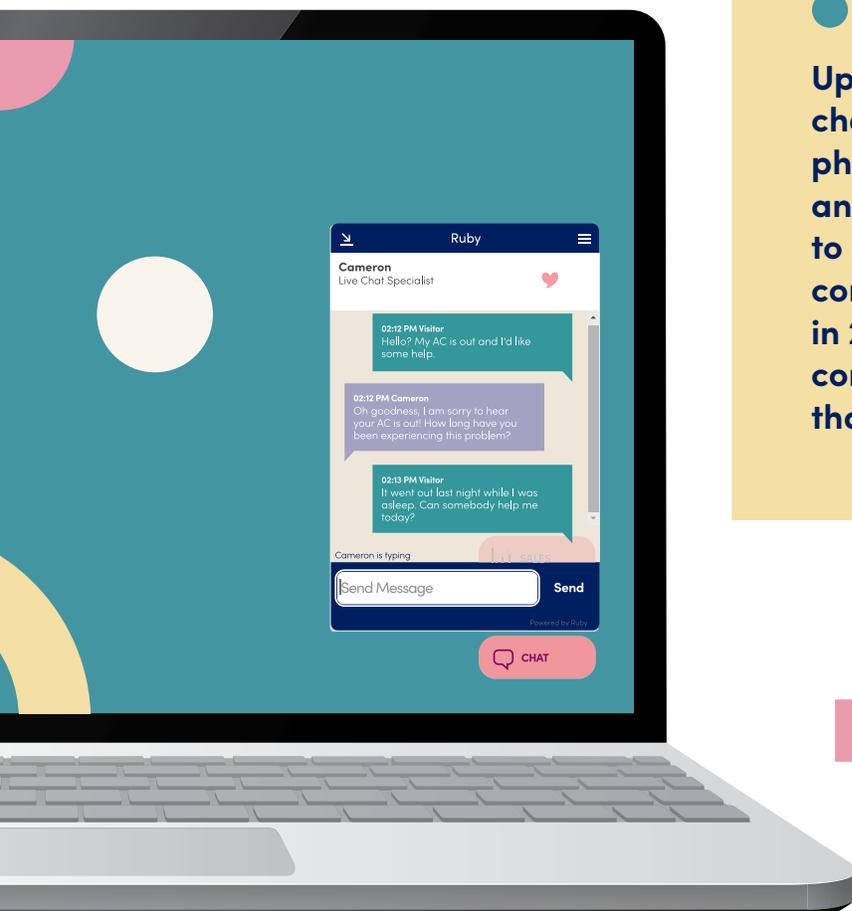
Technology enabling human-to-human connection

Beyond supporting a healthy and supportive company culture, investing in phone and chat-related technology provides the opportunity for business owners to have better insight into just how valuable human connections are when conducting business. The value of maintaining focus on all the little ways to connect with customers on a personal level cannot be overstated.



Katharine Nester, Ruby's Chief Product & Technology Officer, advises:

"2020 changed how and when business happens, extending the hours and days that small businesses need to be available to engage with customers. As we move into 2021 and beyond, to survive and thrive, small business owners need a 24/7, 365-day customer engagement solution that enables connections at all parts of the customer journey—from lead capture to building trust to providing ongoing support."



Updating your website to include a chat option and ensuring your business phone lines are answered consistently and prominently, by someone dedicated to making the most out of each conversation, will be the difference in 2021 between the businesses that continue to grow, and the businesses that struggle to keep up with change.

4 WAYS TO GROW YOUR BUSINESS IN 2021

“2020 revealed the gaps and friction points within the majority of customer experiences. Most businesses and brands proved they could pivot. With the new landscape to navigate, these expectations are not going away. Companies will need to up their game and continue to ‘play the reality of the scene’ and adapt as quickly as customers demand it. Where do you start? I see self-service as the #1 most impactful customer experience-related change for both B2C and B2B that businesses can set as their North Star. Companies will win big if they prioritize self-service and innovate on answers to questions such as;



- *How are you getting everyone, internally, on the same page and aligning on a single North Star?*
- *How are you scaling self-service and increasing engagement without losing brand quality and perception?*
- *How will you incorporate AI and automation without losing the human touch?*
- *How will you capture data in real-time and translate that into actionable insights?*
- *How are you meeting your customers and clients where they are? Across all channels?*
- *How will you measure frustration? How are you tracking sentiment?*
- *How are you engaging with empathy?”*

Sara Christine

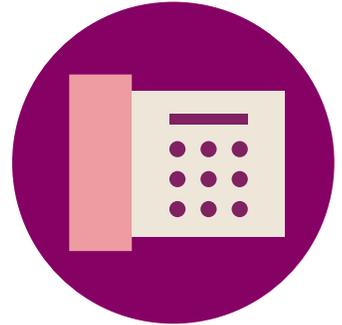
PRINCIPAL & FOUNDER, HELLO SARA CHRISTINE LLC



Answer the phone

A ringing phone is an unanswered opportunity and an annoyance for potential customers.

Providing a reliable, consistent, friendly [experience on the phone](#) is one of the ways businesses can continue building relationships with customers. Having someone on the other end of the line who answers with kindness and enthusiasm creates human connections that drive real business growth—in the short and long term. Plus, happy customers spread good word of mouth and write positive reviews.



Meet customers where they are (hint: online!)

More often than not, customers are now starting interactions with the companies they do business with online. This means websites and social channels are now the first places people go to find information about a business and get their questions answered.

If a business has a solution in place to [engage in real-time](#) with people visiting the website, it increases the likelihood of them doing business with that company and boosting the bottom line. That's because when people are able to connect at the moment they have a question, or (better yet) ready to purchase, there's a higher chance of closing new business.

Customers that use live chat spend 60% more per purchase.¹³

Communicate proactively

It's important to communicate proactively with customers and potential customers. Take the time to make sure the following channels have updated operating hours and important information related to safety/health protocols:

- Google "My Business" profile
- Website headers
- Social media bios and info sections

Also, consider:

- Writing a blog post or posting a video outlining the safety/health precautions being taken to keep customers and employees safe.
- Sending out a special email campaign letting customers know what to expect
- Creating a FAQ list a receptionist or chat specialist can use for quick reference



More than 70% of consumers expect your business to understand and anticipate their needs.¹⁴

¹³ Software Advice, "7 Live Chat Statistics You Can't Miss", 11/18/2020

¹⁴ Salesforce, "State of the Connected Customer: Third Edition", 2020

Make it personal

Doing business successfully in 2021 means making the necessary changes to meet customers where they are (on the phone and online) while offering personalized, friendly, and safe ways to conduct business in a quick and easy fashion.

- Refrain from using acronyms, buzzwords, or industry terms. Remember that language familiar to you and your team may not be easily understood by potential customers.
- Talk to customers in a natural voice, rather than pre-packaged phrases. Use your personality to build that connection and draw people into what you're all about.
- Following up with customers after every exchange is a simple way to keep the engagement warm and show you care. Make it part of your workflow for every interaction. Even a simple 'Thank you' email can go a long way.

We all know from experience that happiness has a ripple effect: treat people with kindness, and they're likely to pass it on. So for business owners looking to get a leg up on the competition in 2021, it makes sense to look into solutions that offer consistently friendly and personalized connections with customers over the phone and website.

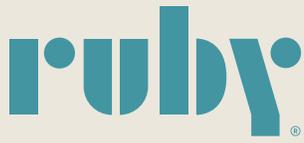


"One of the bright spots in an otherwise dismal year was an increased focus on customer experience. Customers paid special attention to the companies that were working hard for them during the pandemic, showing empathy and care. They rewarded those companies with their continued loyalty. As customer expectations continue to increase, it has become more evident than ever that customer experience is the last true differentiator."

Dan Gingiss

CUSTOMER EXPERIENCE SPEAKER, AUTHOR AND COACH





Ruby provides small businesses with the [services, products, and analytics](#) they need to manage customer interactions and deliver exceptional experiences in an increasingly digital world. Our remote receptionists and web chat specialists provide personalization that's supported by smart technology, allowing you to stay focused on your highest value work.

Our services build loyalty and trust, helping your business enhance its reputation for kindness, convenience, and speed.

We train each specialist to represent your practice just as you would, making them indistinguishable from an in-house customer service representative, at a fraction of the price.

Our services.

Ruby's 24/7/365 receptionists and website chat specialists are there right when you need them, even after hours. Our HIPAA compliant team takes calls, supports scheduling, gathers intake, and creates an atmosphere of quality care on your behalf.

Ruby's convenient mobile app allows you to manage your business anytime from anywhere so you'll never miss a connection. From answering calls while you're caring for customers to capturing leads while you're with your family, Ruby offers friendly, professional service that saves you time and sets your business apart from the competition.



See why 13,000+ businesses trust us with their most valuable asset: their customers. Business owners who work with Ruby report increased productivity, better profit margins, and higher client retention rates.

Learn more about how Ruby's friendly receptionists and chat specialists can help you turn contacts into customers.

844-311-RUBY (7829)

www.ruby.com