



Easy wins for Account Managers using **Pulse**

Index

0. Get the most out of the Pulse platform
1. Boost your response rates
2. Attach additional content
3. Add an introductory video into your review
4. Create a QBR Schedule
5. Upskill your team on Clientshare Pulse



Get the most out of the Pulse platform

This guide will help you maintain and optimise how you use the Clientshare Pulse platform, making sure you're getting the most out of your time with us. Below you'll find key tips to keep in mind whenever you're sending reviews with Pulse. If you have any questions or would like us to expand on the information provided here, get in touch with your CSM, we are always happy to help.



Companies who invest in customer experience:

grow revenues
4-8%
faster than their peers

deliver
6-14x
stronger customer value

have
55%
greater client retention

1. Boost your response rates

5-15% of in-person surveys received get a response, a number that jumps up to around 30% in response rate when online. We hope to boost your response rate even higher with the look and feel of our reviews.

To further maximize your response rates, one of the most important things to keep in mind is the number of recipients that you send a review to. We often see account managers sending their beautifully crafted reviews to fewer than 5 recipients which can lead to low number of responses and therefore less qualified data. So, remember to send your reviews to as many recipients as possible to get that high value feedback and data.



Gartner stats suggest getting around

6-10 responses

from key Stakeholders to get a stable picture of your client health. Focus on these individuals to add the most value from your feedback.

Benefits

If you're only getting a small sample of feedback (less than 5), you run the risk of having inaccurate data regarding your relationships and service.

- **More data** – every piece of feedback you receive creates easily digestible data.
- **More insight** – every piece of data will provide you with a more in depth understanding of your customers and their needs.
- **More retention** – every time a customer feels seen and heard, the likelihood of their repeat custom increases.

BENCHMARK: Whilst some surveys are only for specific individuals, others have a wider circulation need. **We recommend at least 10 people** to get the best results.



2. Attach additional content

Attaching additional downloadable content to your review is a great way to ensure engagement after the review has been made. This could be reports of their data, a Case Study, a QBR report or just some additional information they may find useful.



Attach

3x content

to maximise engagement

Benefits

Developing your clients view of your relationship through content will add to their impression of your value.

- **Confirmation** – adding content solidifies the talking points of your reviews.
- **Value** – adding content not only adds value to the review, but it demonstrates the wider value of your organisation.
- **Transparency** – adding content creates trust. This is especially effective for those unable to attend reviews like Senior Leadership.

BENCHMARK

Aim to add at least 3 pieces of content to your reviews. You will increase content engagement if you vary the types of resources. Try including a Presentation, a Document and a Web article for example.



Content

Monthly Review Deck

Monthly Review Slides

PPTX Q1 2022 QBR Template 1.pptx

Download

Helpful Article

Article mentioned in the call today

www.google.com

Open link

Branding Imagery

Branding to be added to your next Internal review

PNG MicrosoftTeams-image.png

Download

Hi there, what brings you to Clientshare today?

Adding content let's your clients see that you know your stuff and your value extends beyond calls and meetings.



3. Add an introductory video into your review

Adding a video to your Review is a sure-fire way to get higher engagement. This is especially true of more senior stakeholders. An extra 2 minutes could have big pay off when you come to analysing your data. Videos can be recorded by the Account Manager sending the review, or alternatively, by senior leadership to attract those more senior responses.



Record an introductory

Video

to maximise engagement

Benefits

Clients that know your face are often kinder and more understanding in those moments of doubt in the business. And of course, you will increase your response rate and insights.

- **Engagement** – adding a video is a sure-fire way of increasing your review engagement.
- **Low Effort** – adding a video does not mean it has to be professionally filmed.
- **Flexible** – adding a video creates rapport with your clients and encourages them to engage with your organisation.

BENCHMARK

Every review you send should contain a little video message to explain the purpose of the feedback they are about to give.

Nervous in front of a camera?

If filming a video is your worst nightmare, you're not alone! Here are a few pro tips to help you get camera confident;

1. Keep it natural – Don't over script yourself. Remember, you are trying to build authenticity and rapport. Be yourself. Imagine you are greeting a friend or family member.
2. Relax and move – We naturally use our hands and arms when we talk. Embrace this when recording your video.
3. Use whichever device is easiest for you – If you're more comfortable in front of a phone rather than your webcam, that's fine! Whatever makes you the most comfortable.

Viewers retain 95% of information delivered on video, as opposed to 10% delivered in writing.



4. Create a QBR Schedule

Make sure that you create a regular appointment for reviews (ie monthly, quarterly) to ensure that your clients get into the routine of reviewing. Reference the reviews regularly when in contact with your clients to further demonstrate the value of your QBRs and your understanding of their needs.



Schedule your
QBR's
to add the most value

Benefits

Regular catchups allows you and your clients to build a consistent, mutually beneficial and friendly relationship.

- **Warmth** – clients will look forward to QBRs, forming a deeper connection between you and your clients.
- **Clarity** – clients will appreciate transparent and clear expectations.
- **Retention** – clients will feel empowered to be a part of changes that are made, reducing churn.

BENCHMARK

In a client call, feel free to get the preferred date of your next QBR from your client and set a reminder to ensure these QBRs are completed on time. It would also benefit to have a store of your clients QBR schedules If this isn't already available for the wider team.



Take the time to analyse the results between reviews, your clients will see the value you add to their business.



5. Upskill yourself on Clientshare Pulse

Team awareness and customer awareness is huge when implementing a new process or platform such as Pulse. Empower yourself and colleagues to present the purpose and the potential value that can be added using Pulse in your interactions with clients. Don't forget to let your clients know about Pulse. The more guidance you can provide them, the more useful your feedback will be!



Upskill

your team

to ensure they know how to add-value

Benefits

A team who is unaware of how Pulse works is at risk of having low engagement or responses on the platform, or even worse, low activation.

Where certain users may never have logged in, this of course impacts your relationship with your client and cap the potential value that can be added to them.

- **Awareness** – knowing your product empowers you to present the purpose and potential of the platform.
- **Communication** – sharing the platform with your clients allows you to raise engagement.
- **Guidance** – educating your clients will improve the quality of the reviews you receive.

CHANGE MANAGEMENT

The primary focus needs to be getting users to login and get set up. Once users are Active, the risk of client uptake being poor drops dramatically. On each call with them, check in on their Activation rates and empower them to act internally to improve them. 90% is the goal.



Increased engagement demonstrates your added value. Increased activation creates infinite potential for your client relationships.