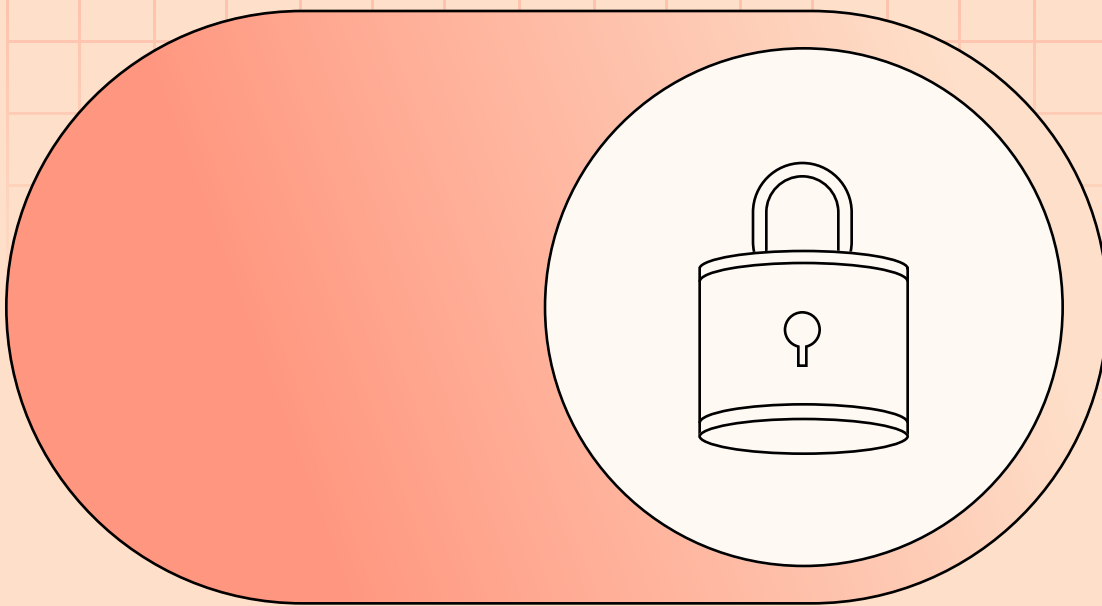




A guidebook by  
Eli Weiss



# CX Unlocked

From first impressions  
to lasting loyalty.

# A note from Eli



There's a lot we can change about the way businesses think about customer experience.

The idea that CX needs an overhaul has guided me from the very beginning. It's informed how I've handled challenges (managing CX for a Kickstarter luggage brand that delayed product delivery for over a year), and huge wins (redefining surprise and delight at OLIPOP).

Through all of my past roles and experiences, I learned to trust myself to do things differently, to wear my heart on my sleeve, and to put the customer first.

I've been thinking lately that as an industry, CX is quiet. The people who operate in this space generally like being in the corner.

We're a band of really passionate people who are ambitious and working hard to create memorable experiences for customers.

I want to celebrate CX teams, take them out of the corner, and empower them to be core contributors at their companies. That's the best way to put the customer first across your organization.

In this guidebook, I'm excited to share a framework that redefines how to tackle CX at your company from the very beginning, from hiring your first support employee to designing magical moments for your customers.

I'll also challenge some of the norms in CX and give you some actionable tips to start fixing what's broken.

I hope you enjoy it.

**Eli**

Eli Weiss



# CX Unlocked



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Why CX is inherently broken	1
Building and managing CX teams	9
Great customer experiences aren't expensive	12
How to handle common challenges in CX	21
Drive revenue with great CX	35
Automation and the future of CX	40
Rewriting the script	42



## Eli Weiss

Eli has spent the last decade building and operating early-stage startups.

He is particularly known for his work around Customer Experience and Retention at DTC brands such as OLIPOP and Jones Road Beauty.

Eli is passionate about building brands that put customers first, and has built a career doing so.

# Why CX is inherently broken

CX has dramatically shifted in the last decade, but we still have a massively long way to go.

We're stuck in a phase where businesses — and support organizations — lean heavily on scripted policies, systems, and responses, often with little to no flexibility.

Company leaders (and many CXers themselves) believe that creating magical customer moments outside of those rigid policies will be too expensive. But in reality, that's not true.

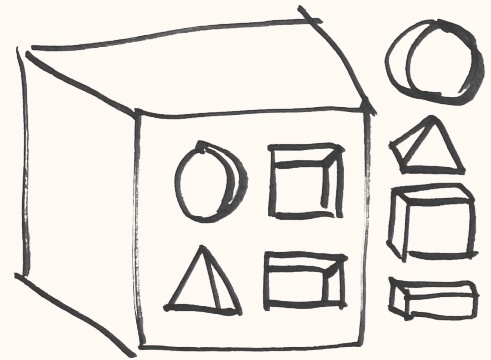
You can't expect your own leaders to unlearn this and change a customer's experience with your brand on their own. As a CX leader, you have to pivot from seeing customer support as a powerless part of the business to recognizing it as an opportunity to transform it.

This guidebook will give newcomers to CX a 101-style introduction to the field. But even if you're an experienced pro, the counter-intuitive approach in this guidebook will provide the shakeup you've been looking for.

# Building and managing CX teams

The best CX teams, whether one person or many, are passionate about CX and helping people. The CX leader's responsibility is to lead by example.

Especially when you start your CX function, putting the customer on a pedestal is the only way to create something magical, and it really does start with the way you put together the team, tools, and processes.



## Your first CX hire

**If you're a founder and spending 30+ minutes a day on CX, it's probably time to find help.**

# Tips for making your first hire

**Look for a generalist who is passionate about CX.** To start, you might not need 40 hours a week on CX, so look for someone who can help with other things as well. They might be able to help with ops, marketing, sales, etc. Early-stage is hectic!

**Choose someone who aligns with your brand values.** Your first hire sets the standard and tone of CX at your brand. Choose someone who personifies your brand and can build that culture into the bedrock of your team.

**Find someone who is excited and motivated to succeed.** You'll need a self-starter, who can support you in creating the Macros (standardized templates), key processes, and strategies for your team. They should also be someone you can see becoming a future leader as you build out the team.

# How to find great CX folks

## Look to other industries.

Consider people in hospitality, teachers, and anyone who has patience and a genuine interest in CX. You don't want someone who's just trying to get a job.

**Post the role on LinkedIn.** LinkedIn is a solid resource to find great employees.

If you put a few dollars behind the job listing and ask some industry folks to share it as well, that usually nets good results.

## Put effort into the job description.

Make it compelling — you need to sell both your team and your company. The more time and effort you put into the job description, the more likely you are to get applications from candidates who meet what you're looking for.

**Ask your CX connections to share the role with their network.** CX folks are highly likely to know other CX people who might be looking. The best candidates are usually working at a different brand.

Go poach them!

Don't ask typical interview questions. When interviewing, make sure candidates are passionate about CX, not just looking for a foot in the door (to later transition to marketing or sales). Ask them how they would handle a disappointed customer, and how they've handled frustrating incidents in the past.

**Hire folks who love CX.** Hire folks who will read between the lines and deliver magical customer moments, even if it's just a kind tone or willingness to help. When someone loves service and making things right, customers feel that. It's really hard to instill a passion for CX within someone who does not naturally care for it.

## Hire people who already love your brand.

If you hire a loyal customer or fan of your brand, you know that they already understand (and are aligned with) your brand's core values, benefits, and products.

## Hire a team with a variety of strengths.

I hired my team because I believe in their abilities. Every CX team needs a mix of incredibly efficient people who move really quickly, and some people who are thorough and thoughtful and create magical moments by following up and reading between the lines.

# How to keep CX teams motivated and engaged

The United States Bureau of Labor Statistics found that on average, support agents between the ages of 20 and 34 only stick around for about a year.

After talking to hundreds of folks over the years, and considering my own experiences, I learned that if you're "good" at CX, it's because you have an extra dose of empathy.

The flip-side, though, is that you feel things deeply and get emotionally burned out quickly from spending your nine-to-five defusing annoyed customers.

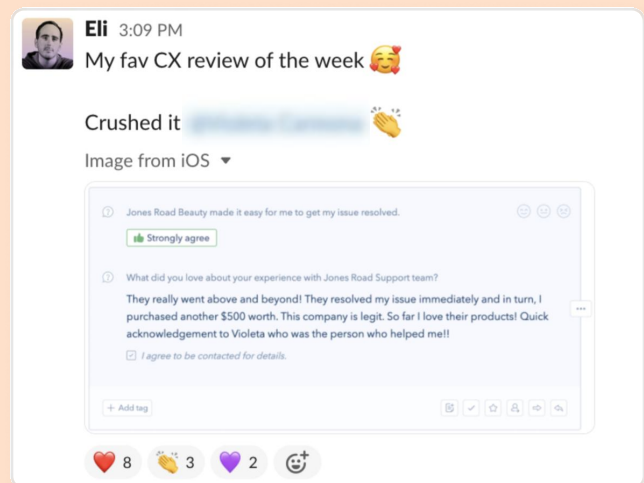
Unfortunately, most customers who reach out are annoyed and want a refund, and tackling hundreds of those tickets leads to burnout.

Here's my framework for motivating and supporting your CX team.

## Show your team you appreciate them

Be the biggest cheerleader they have: I post the biggest wins to the rest of the org on the general channel in Slack. If my team wins big, everyone will know!

I share the most amazing CSAT customer responses with the team weekly. Nothing boosts team morale like sharing wins constantly. I share wins publicly and lament losses privately.



## 💛 Dedicate yourself to putting them first

My goal is to support my team — they're my number one priority.

For example, I'll cancel a meeting with the CEO for a team member. I'll make space at any time of day to talk to my team. It can be about work, but it can also be about something personal if they wish. I support them and care deeply about them as humans, not just about the work they do.

My most important question on a 1:1 is:



***"How are you doing?"  
"But, like, really...  
How are you doing?"***

If they are feeling good mentally and physically, and their work is appreciated, acknowledged, and valued, great work comes easily.

I also never expect my team to do anything I wouldn't do myself.

Before passing along *anything*, I make sure I have done it myself, or at the very least, understand what it takes to get it done well.

Finally, when things go wrong and we need extra help, I'm the first one in the inbox. I help on weekends and I help on holidays.

## 🧠 Prioritize their mental health

So many junior employees feel the need to prove themselves as being dependable by working 365 days a year. Even I spent the first few years of my career never taking a day off.

I vividly remember taking my laptop out at the Conrad in Bali, when I should have been completely offline and celebrating my honeymoon.

I thought that was "hustle," and that it would help me to continue to grow in my career. Years later, I learned that a great leader encourages their team to take off, and makes sure they feel safe enough in their job to do so.

Healthy PTO culture starts with the leaders on a team. If leadership works while on vacation or never takes time off, what sort of example do you think that sets for the team?

Take time off. Encourage your team to as well. Don't reply to Slack messages when you're off, and don't take meetings. For CX teams, down-time is rest time, and it's so important. It helps to create a healthy team dynamic, and allows agents to deliver better service when they feel rejuvenated.

At OLIPOP, we instituted Mental Health Fridays, where CX team members took off one Friday a month. That was mandatory, aside from the unlimited PTO we had, and I encourage you to do the same with your team.

## Create core values and guiding principles

Before growing a team, it's imperative to draw up a list of your team's core values. This creates a foundation to build your team on, rather than just adding head-count and hoping the vibes stay good.

When I started at OLIPOP, so much of the focus across the company was growth.

The product was great, we were launching great new flavors, and the energy was high. CX, on the other hand, was just keeping its head above the water.

I remember the moment I realized we were doing quite well, but had no depth or mission. We were reactive instead of mission-driven and proactive. I spent a few hours putting together a deck, and here is one of my favorite slides ↓

### CX Core Values:

- Always aim to elevate the customers experience. Enter every interaction with the intent of making it a positive one. Whether or not a customer likes our brand, aim to ensure they always love their interactions with our brand.
- Align and unite the organization around the customer. Educate the rest of the organization about the customer and the experience we aim to provide.
- Innovate with data – use data to bring forth the voice of the customer.
- Ensure that the customer and the impact on the customer is embedded in all relevant conversations and decisions.
- Always elevate and make people's day better (including our team). Support across the lines as needed, be honest when you can't.
- Focus on the quality of responses over the response time.
- Aim to be focused, not "swamped". We choose the most important initiatives and make time for it.
- Be empowered to be part of the solution, not looking at the problem from the sidelines.

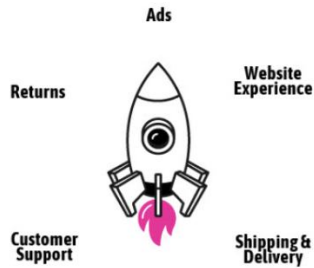






Here are two similar approaches I created for Jones Road Beauty when I joined the CX team there.

## CORE MISSION



### OUTPUT

When done right, we ensure that we are meeting expectations across the entire customer journey, not just resolving problems.

We are the eyes and ears of the brand.

## CORE VALUES

- Always aim to elevate the customer's experience. Whether or not a customer likes our product, strive to ensure they always love their interaction with our brand.
- We want people to walk away with a position memory after speaking with us. We go above and beyond to listen and help.
- Help create feelings of unexpected joy and delight by breaking the script and going above and beyond.
- Use data to bring forth the voice of the customer.



Set aside two hours and build your own. Riff off of mine if it's helpful. A set of guiding principles is the first step toward building a CX program you're really proud of.

Once you carve your mission in stone, your next job is to make it a reality with ambitious (but realistic) strategies.

# Great customer experiences aren't expensive

At the end of the day, it's about a great product supported by a hassle-free experience.

While some larger corporations may create buzz with handwritten cards and 24/7 support, the reality is that most brands don't need all the bells and whistles to provide excellent CX.

The Zappos and Chewys of the world are marketplaces, and need to provide differentiators to stand out.

Yes, your brand certainly should be creating memorable experiences, but it (almost certainly) should not be by hiring hundreds of writers to write physical cards ↗

Here's how to shift your CX program from mediocre to memorable without breaking the bank:

## Keys to Successful CX

- Build customer loyalty
- Provide proactive support
- Offer omnichannel support
- Strive for rapid response times
- Include accessible self-service
- Always look for ways to improve
- Fill the valleys before creating peaks
- Look for memorable ways to break the script

# 01

## Build customer loyalty

Customers rave about brands with experiences that are free of friction, have customer-centric core values, and support people across the buying journey. When you make an effort to create thoughtful and easy customer experiences at every point, customers will find it effortless to stay loyal to your brand.



Here are the building blocks to gaining customer loyalty:

### Maximize pre-sales moments.

What does customer experience look like when customers aren't contacting you? Reaching out to customers with a text message or chat pop-up to see if you can answer any questions that are blocking them from purchasing lets them know you're there to support, even if they're not a customer yet.

### Represent the voice of the customer.

If and when you make changes to the product, website, fulfillment, or packaging, how will your customers feel? Represent your customers in all internal meetings and discussions because the decisions you make will affect them.

### Create customer-centric policies.

Use policies as a guide to establish what the maximum and minimum is that you can offer to remedy a negative experience. Otherwise, focus more on inspiring your team to create magic.

At its very core, customer experience relies on the trust and humanity between customers and the agents who help them. It might sound simple, but in reality it's those moments that make the very best brands stand out from the *just* okay.

# 02

## Provide proactive support

Today, DTC companies are starting to realize the importance of building strong relationships with their customers through personalized communication and proactive problem-solving.



Here are some ways you can be proactive as a CX organization.

### Ask for customer feedback at every opportunity.

Talk to your customers to better understand their experience along each point in the customer journey. Using the Jobs To Be Done framework, identify what “jobs” your products do for your customers. The best customer experiences feel like you are there to answer a customer question before they even reach out.

### Track real-time analytics.

Real-time analytics tools monitor customer behavior in real time, so you can quickly identify patterns and trends that could lead to problems down the line. For example, these analytics could help you identify that there’s a problem with a coupon code working, or a product quality issue before it gets out to the masses. Your team can work on a fix before you’re flooded with tickets.



If you’re looking for a helpdesk that can help you provide great support and track metrics like these, I highly recommend Gorgias. You can easily monitor trends like this and notify the appropriate team before things get really out of hand.

### Celebrate customer moments.

In general, we remember moments because they cause extreme changes in our lives — whether they are peaks, pits, or transitions. It’s the same for customer experience: Customers remember brands for the moments they experience with them.

### Track predictive analytics.

Predictive analytics help you analyze customer data and behavior over a set period of time. They allow you to better predict when customers are at risk of churning and take proactive measures to prevent it. This is especially helpful for subscription businesses. For example, your analytics might show that most customers cancel their subscription after three months. If you know that information, you can create incentives for them to stay.

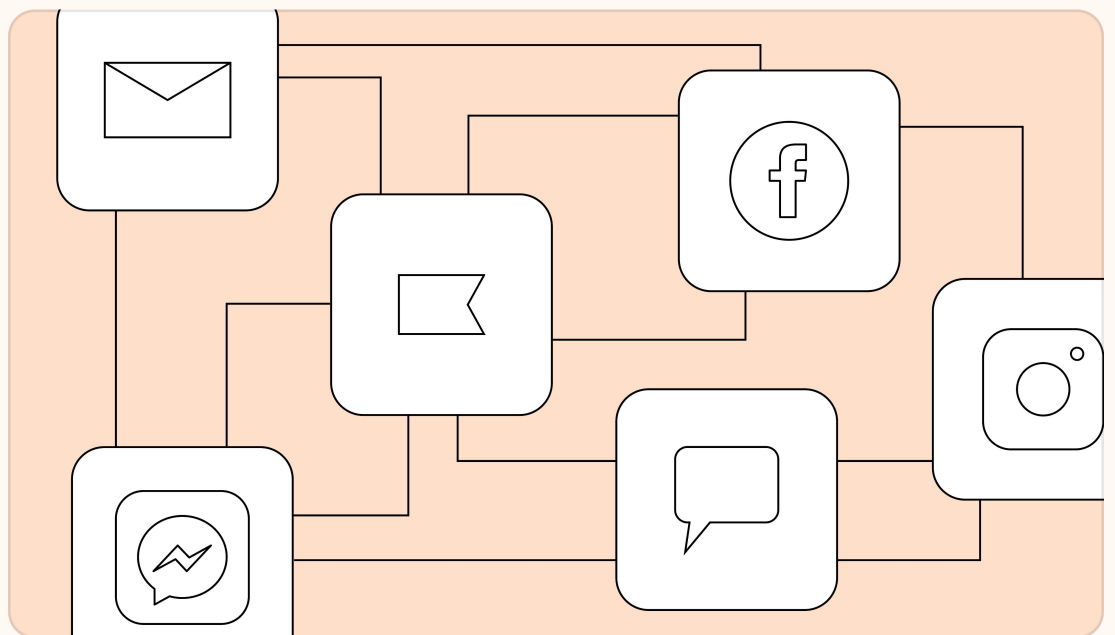
# 03

## Offer omnichannel support

Omnichannel customer service means supporting customers across multiple communication channels, like email, SMS, live chat, and social media.

Creating magical experiences means chatting with your customers like people on the channels where they actually spend their time.

For example, SMS is a more personal form of communication, so loyal customers might get the most value from subscribing to SMS notifications or getting help on that channel.



# 04

## Strive for rapid response times

When customers run into an issue big enough to reach out to support, the most magical experience is a fast, helpful answer. Plain and simple. Ultimately, this means getting your internal operations and processes right before the questions even roll in.

### Rules > Auto Tag Urgent Sentiment

**Rule conditions**

WHEN NEW MESSAGE IN TICKET X Add Events...

THEN ▾

IF ▾ message sentiments ▾ CONTAINS ONE OF ▾ urgent X Add sentiments...

AND message body ▾ CONTAINS ONE OF ▾

address wrong X edit address X change address X accident X cancel X Add words...

THEN ▾

ADD TAGS Urgent X Add tags...

💡 Set up Rules that automatically tag tickets in Gorgias. For example, if there are keywords like x or y, tag the ticket as “urgent” or “delayed.”

### 📌 Leverage Tags

Use tagging as a way to catch urgent issues. For example, you can set up automations that tag any email with the words “cancel my order” or “need to change shipping address” to be tagged as “urgent” so your team can tackle those tickets first. This saves us a silly amount of stress every day.

Also critical to getting a CX function set up is creating processes that turn customer experience from reactive to proactive. What that means for a very early brand is ensuring you can learn and iterate from customer feedback.

When a customer reaches out to complain about your product, you’ll want to know if this is a broader problem others might have. Tags fix this.

Within your helpdesk, set up Tags for feedback or issues that come in that should be tracked. I generally like to think about it like this: Is this an issue that could come up again? Or is this probably a one-time thing?

I recommend having a selection of 30-50 regularly used tags and taking no more than 10 minutes to tag tickets. This creates solid reporting without a large lift.

## Use Macros and scripts

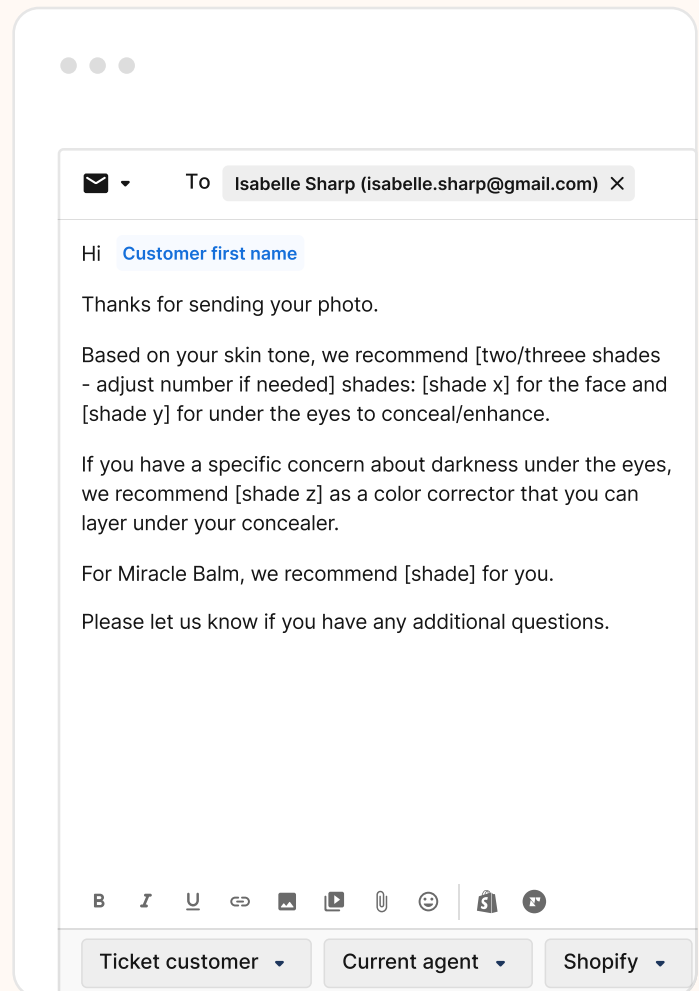
Macros are the canned responses, the quick replies, the backbone of an efficient CX squad. You can reply to an email with a detailed and comprehensive response in a few clicks, without typing it all out. Gorgias-enabled variables can save you even more time, because you don't need to go to Shopify (or your ecommerce platform) to find and copy/paste the right name, order number, shipping address, and so on.

Streamline responses with Macros so your agents spend less time typing out the same responses. Especially with a tiny team, Macros and automations will help you keep up. As your team grows, Macros are key to keeping responses consistent, accurate, and on-brand.

Like any other tool, it's important to make sure it creates efficiency instead of eroding it. Make sure you are creating and using Macros correctly. That means:

- **Don't create a Macro for every email you need to respond to.** Create Macros when you have an issue coming in multiple times. Creating a Macro for one-off emails takes more time than it pays back.
- **Always leave room for personalization.** I encourage personalization at the beginning, middle, and end of all Macros. They're supposed to save time, not substitute for a personalized experience.

It can be as simple as spelling out their name and highlighting a recent product they purchased. Even if it's just adding a personal line in the beginning and end, it is super helpful. A great example of that is our shade-matching Macro. It looks something like this:



Our agents will jump in and sub in the recommended shades for each skincare product customers are interested in.

## ✔ Organize conversations with Rules

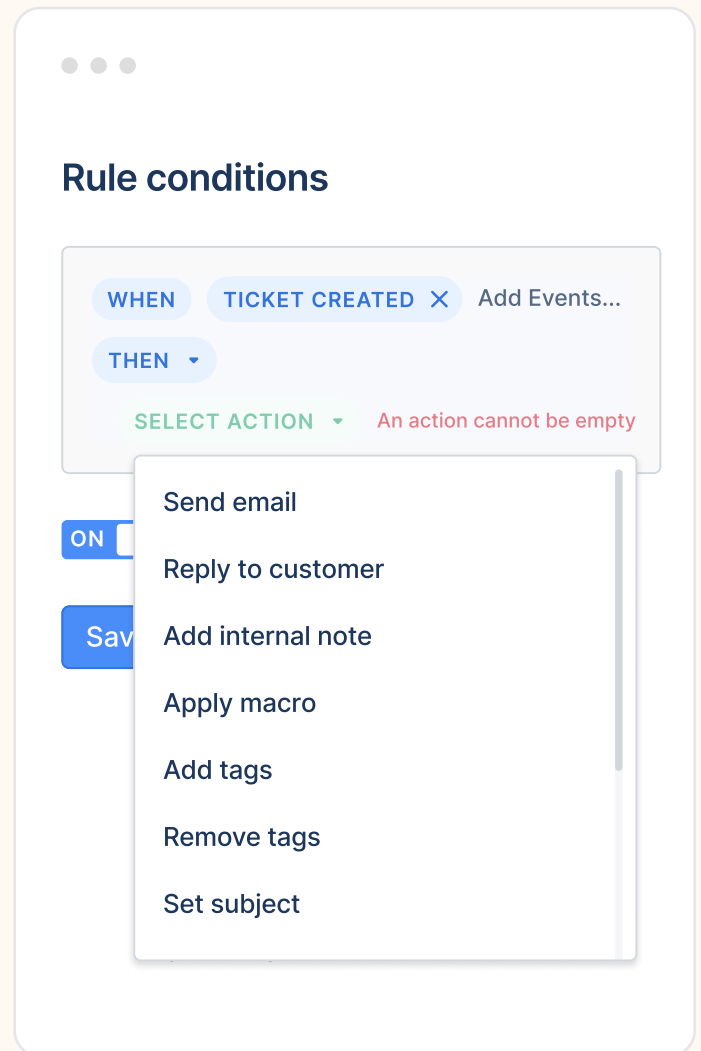
Automating ticket triage makes sure your inbox is organized and means that agents don't have to spend any extra time assigning tickets.

Rules in Gorgias give you the ability to automate things like Macros and ticket routing within your helpdesk. You can auto-tag, auto-reply, and do a whole lot more.

Some other Rules we use at Jones Road Beauty include:

- Tag all SMS tickets as urgent so we can reply to them first
- Auto-assign social tickets to our community associate
- Auto-assign NPS to an "NPS response squad" team
- Notify an agent if ticket assigned to them has responded
- Add the tag "shade match" if an email has the words "shade," "help with color," etc.
- Auto-close OOO email replies to our email campaigns
- OOO reply to chats that come in outside of business hours

Getting creative with Rules can hugely amplify the impact of your small (but mighty) team.



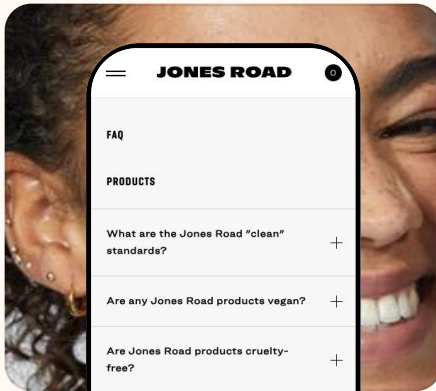


# 05

## Include accessible self-service

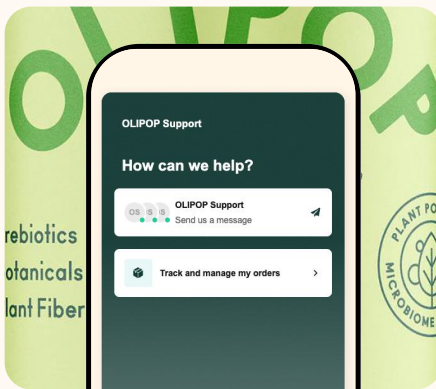
Customers shouldn't always need to go to your support team for answers. Self-service options like a Help Center, automated FAQs, and portals to track and manage orders are the best way to quickly provide answers without drowning your team in tickets.

Don't forget that self-service options should be easy to access, too. Put them front and center, like in your website's main navigation or footer. Customers should be able to find what they need with just a few clicks.



### Jones Road

For example, at Jones Road Beauty, we have an extensive FAQ page that answers common questions like, “Are your products vegan?” and “What are the Jones Road ‘clean’ standards?”



### OLIPOP

I also set up a self-serve support pop-up when I was at OLIPOP, which allows customers to check their order status, report issues, and request cancellations or returns. It's something I recommend looking into because customers don't need to start a chat with your agents in order to get the information they need. According to Gorgias, the Automation Add-on can easily deflect and automate up to 30% of chat tickets!

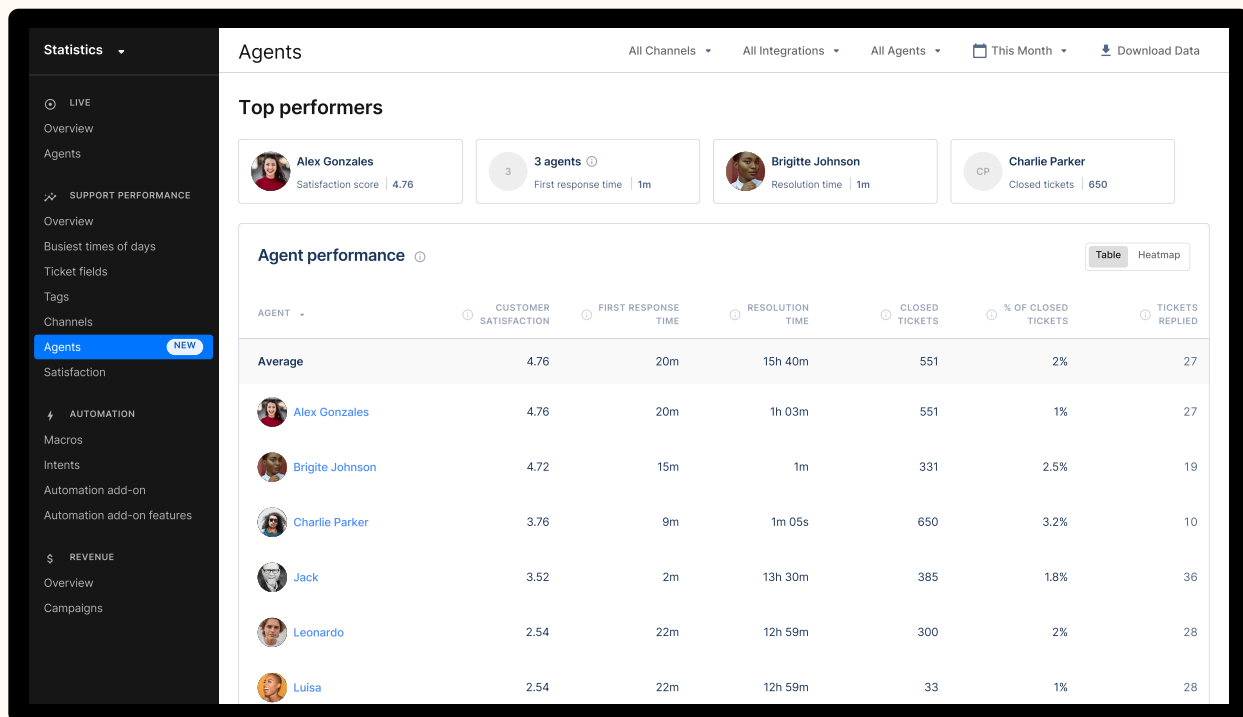
# 06

## Measure and improve

You'll want to dig into your customer service metrics, like response times, customer satisfaction scores, and resolution time. Measure it, analyze it, and figure out where you can refine customer service even more.

Maybe your response times are extremely slow, and you need to start using automation. Maybe customers are complaining about a confusing checkout process.

**Whatever it is, your customers are your cheat sheet. Use the feedback to identify improvements, and implement those changes.**



If you're like most CXers, you have 100 ideas of improvements you could make — but not the budget, resources, or timing you need to pull them off. Data helps you prioritize those changes based on what'll have the biggest impact, and make an argument to company leaders for the budget to put them into action. Our goal is to continuously learn and iterate on how we can improve on the customer experience.

# 07

## Fill the valleys before creating peaks

One of the most important books I recommend CXers read is *The Power of Moments* by Dan and Chip Heath. One of the most important concepts in the book is the idea that “creating peaks” can’t happen before your “valleys are filled.”

Address the negatives before you start amplifying the positives. In customer experience terms, this means you should identify and resolve the pain points your customers face before rolling out your “wow factors.”



Here are some ways you can start amplifying the positives.

### ① Locate the valleys

These are the low points in the customer journey, and you can spot them through customer feedback or data analytics.

Maybe it's a long wait time on customer service calls or a confusing checkout process online.

Throughout my career the question is the same:

**“How do I create a ‘Zappos-like’ Customer Experience?”**

### ② Address the issues

Once you've found these issues, the next step is to address them.

It's all about creating a smoother, more enjoyable experience for your customers.

The answer is this:

Zappos nailed every single part of their customer experience before even focusing on memorable “above and beyond” moments. They hit the expectation nail on its head across their website, shipping and delivery, and CX before even considering a surprise and delight initiative.

### ③ Create peaks

Now you're ready to introduce the peaks. These are your standout moments that make customers truly appreciate your brand. This approach allows you to build a more comprehensive and effective customer experience strategy from the ground up.

# 08

## Break the script

The concept of “Breaking the Script” is also from *The Power of Moments*, and suggests that defying customer expectations in a positive way can create a memorable experience. The idea is that we all have certain scripts we follow in our lives, including when we interact with brands. When you “break the script,” you’re essentially veering off the expected path to surprise and delight your customers.



“Thanks Jones Road for the gift and encouragement as I continue to battle breast cancer.

Please note that I have talked about and shared samples of Miracle Balm in the four shades that I own to other women who are in the fight as well. Your products make my skin look and feel better. Even the process of applying it is therapeutic. I’m so happy I turned onto JONES ROAD!! #jrbrocks”

For example, if I purchase makeup from a beauty brand once or twice and then join a Facebook group and mention that I’ve been going through something difficult personally, would there be any expectation that the brand would send me a gift and a thoughtful card?

How about if I purchased a case of soda and mentioned I had trouble getting my order due to flooding in my area. Would I expect the soda company to send me and my family dinner? Or if I mentioned to said soda company that their soda created a meaningful moment of happiness for a loved one while in hospice, would I expect anything when mentioning that loved one passed away?

# Every brand talks about wanting to create customer moments, and very few actually do.

They think it costs a ton of money, and takes a ton of planning. From my experience, it doesn't happen because of one of two things:

- **Too much red tape.** Sometimes a memorable moment needs to go through too many approvals to get green-lit, and everything needs to be on-brand. If that's the case, you'll end up with experiences that are meaningful but not personal. Chewy is an anomaly, as they've cracked both personal and scalable.
- **Nobody cares enough.** In order to create these special moments, you have to read between the lines without being completely focused on just resolving customer issues. You need to lean in and treat customers the way you would treat a friend or a family member, not just someone you are looking to throw surprise and delight at.

I just gave you some of my guiding principles. Now, let's look at some of the issues you're likely to encounter, and discuss how to solve them — especially when conventional wisdom isn't the way.



I just got home. I was away with work. I'm at a loss for words. It literally brought me to tears and my family. I cannot be more grateful for your kindness and generosity.

I appreciate you guys so much and your company.

There are truly kind people in this world and you are one of them.



# How to handle common challenges in CX

Establishing a rigid set of best practices for your CX team often leads to more negative interactions with customers than good ones.

Instead, here's the framework I recommend for managing some of CX's common challenges.

# 01

## Lean into individuality

The idea of creating rigid frameworks and not allowing your team to deviate from them, especially when it comes to tone of voice, doesn't make any sense to me.

Instead, encourage your support team to lean into their own personalities.

We have ten people on the CX team at Jones Road. Everyone has a different voice. Sydney is a gal in the Midwest and she's going to sound very different from Violeta, who's in LA, and different from Bryel who's in Jersey. And that's the idea.

Most of our customer reviews call out individuals by name because they had a great experience with that person, not with Jones Road. They had an experience with a person who talks like a person.

You can diffuse frustrated customers so quickly when you just act like a person and talk to them as a person. Rather than establishing rules for the tone and persona we take on as a support org, I ask my team to lean into their personalities instead.

As a team, we share core values. The most important thing to me is that they are kind and genuinely care about our customers. I don't need to strip them of their individuality to achieve that goal.



# 02

## Keep a positive mindset

The biggest difficulty throughout my career was making the switch from seeing CS as a powerless part of the business to an empowered org within it.

The reality of this role is that you're customer-facing. So anytime anyone in any other department of the business makes a mistake, it impacts the customer.

And to those customers, you're the fall person. You're the one who messed up.

It can be easy to fester frustration with other teams that cause mistakes but never have to deal with the fallout — at least directly from customers.

Rather than getting frustrated by mistakes from an ops team, or marketing team, or logistics team, I like to maintain a positive mental framework. I love the Brené Brown mindset that everyone is doing the best they can.

“All I know is that my life is better when I assume that people are doing their best. It keeps me out of judgment and lets me focus on what is, and not what should or could be.”

–Brené Brown, *Daring Greatly*

I also remind myself and my team of the basic **service recovery paradox**: people are more likely to love a brand that creates an issue and solves it for them versus an easy “business as usual” scenario.

In other words, a small mistake from Ops can be a great opportunity for CX to save the day and turn the affected customer into a loyal fan.



# 03

## Establish KPIs based on business goals

The biggest difficulty throughout my career was making the switch from seeing CS as a powerless part of the business to an empowered org within it.

Create KPIs that are relevant to your specific business goals or challenges. Don't just apply industry-standard KPIs to your team — they might not be the right metrics for your brand's objectives and principles.

For example, if your brand is focused on long term advocacy, you might not worry about messages per ticket or one-touch ticket resolutions as much as CSAT or Customer Effort Score (CES). On top of that, we've seen that customer returns are not necessarily as negative as many other companies see them.

Yes, we might be losing revenue, but we believe strongly in our product and know that an easy and seamless return policy can not only create a positive customer moment, but might even create a future customer advocate.

We found this to be true at OLIPOP. If someone dislikes Stevia and thinks OLIPOP tastes vile, they can potentially become a brand advocate if we fully refund them and thank them for giving us a shot.

They (hopefully) understand that their Stevia aversion is a personal one and that the folks at OLIPOP are amazing and deeply care. We experienced this numerous times where people who disliked the product have shared it with their friends.

Just be careful not to laser-focus on KPIs where your team is only driven by saving money at the "today level."

# 04

## Create customer feedback loops with the rest of the business

When you establish processes for passing on customer feedback about essential parts of the product to other teams, those people can make real changes at the root.

The most challenging part about deciding which data to focus on is that while you're drinking from the firehose, every piece of data sounds like it can theoretically be important. It can be hard to zoom out and think of the bigger picture.

Here are four non-negotiable areas to always collect data on:

### Product quality issues

While at OLIPOP, we had a customer reach out and say that their Vintage Cola tasted exactly like Root Beer. We collected some more incidents over the next few hours with similar concerns. We pressed Ops to look into it and it turns out we indeed had a few pallets of a beverage charmingly (internally) nicknamed “Whoops Beer” that we were (mostly) able to catch before it shipped to hundreds of stores nationwide.

Keeping track of these related incidents helped us identify a larger scale problem that we were then able to fix.

### Reasons for returns

I’ve never seen a product that every single customer loves. You might have a 90% retention rate, but it’s still important to listen to the people who don’t like your product.

You might not have a product issue, but talking to these people can help you identify issues with the expectations you’re setting for shoppers.

You may not have explained how to use it properly or sold them on overhyped benefits or features, and now they’re disappointed.

## Order fulfillment

As you scale your DTC operation, you'll start seeing more and more mispicks, missing items, and some other wonky things happen. It gets challenging to keep track of what feels like an increase in problems versus what is actually an increase percentage-wise.

It's imperative to tag each and every one of these issues so you can pull them into a weekly report.

## Shipping

Are you seeing an uptick in shipping times with one courier versus another? Are customers reaching out to say their package has been marked as delivered, but they can't find it?

Tag all of this so you can ascertain if a pattern is starting to emerge. You want to be able to catch trends before things get out of hand.

## How to pass that feedback to the rest of the business

- Create a basic weekly or biweekly CX deck to share with the broader team on some larger trends such as weekly response time, top tags used, NPS feedback, CSAT, etc.
- Identify the team who needs to take action on the feedback and send it directly to them. In our case, I'd want to share QA issues with the product or QA team, 3PL/shipping issues with ops/supply chain/3PL, and broader qualitative data with the whole team but primarily with marketing and product.

Share your CX deck on the general channel, and send that separate, individualized feedback to those teams. We've added some of the marketing squad to our NPS channel so they can see all of that themselves, and we also flag more significant issues in real-time.

# 05

## Find solutions for dealing with upset customers

One of the most common questions I get asked is, “how do you deal with obnoxious customers?”

When an unhappy customer reaches out, I recommend listening to them and answering four simple questions:

1. “Did we set incorrect expectations here?”

2. “Is there more to this story than meets the eye?”

3. “Has this customer had a bad experience with us more than once?”

4. “What can we learn from this incident to optimize our future customer interactions?”

Most folks just want to be listened to, understood, and validated. Here's one example of how I would respond to an upset customer who has every reason to be frustrated.



**Template #1:**

(A customer who ordered an expensive item that's taken weeks to ship)

---

Hi [Name],

Eli here, Director of CX at [Brand].

I am so sorry to hear about your experience with us. I can completely understand your expectation around [example: faster shipping] and [example: better communication].

Frankly, I'm right there with you. Really sorry we let you down here.

While our orders generally ship within 1-2 days with priority shipping, it seems like your order slipped through the cracks.

This is certainly not the experience I aim for at [brand].

Here is what I'm doing to resolve this for you:

1. I reached out to the fulfillment team to ensure it is on the way to you, tracking is here: [link to tracking information]
2. I have set up a meeting with our VP of Ops to understand how your order completely fell off the map to ensure this never happens again.
3. I am processing a refund for 40% of your order as a token of appreciation for your patience and understanding throughout.

This is my personal email—please do not hesitate to reach out if anything else comes up. You can be certain we take feedback like this really seriously.

Kind regards,

Eli

On the opposite end of the spectrum, I don't subscribe to the idea that the customer is "always right." Here's how I recommend parting ways with a customer who has been disrespectful to my team.



### Template #2:

(How to fire a customer)

---

Hi [Name],

Eli here, Director of Customer Experience at [Brand].

It's come to my attention that you had a scuffle with a representative on our customer experience team.

We have a strict policy that customers who disrespect our employees are no longer welcome to our site or store.

As per our terms and conditions stated here ([link to your t's & c's page](#)), we are permitted to refuse service based on our discretion.

As of today, you will no longer be allowed to shop on our website.

Appreciate your understanding,

Eli

If you want to build a stellar team, it's imperative for the team to know that you don't just support them as employees, but you always have their back.

# 06

## Empower teams with techniques to succeed

Breaking policy, apologizing sincerely, offering a refund, and being transparent are the four main techniques I like to equip my team with. The policies and processes I implement allow my team room to get creative.

### 🧡 Breaking policy

I'm always going to break policy if it's going to make a dramatic positive impact. What I tell my team is that breaking policy is a technique. So if you feel like breaking policy is going to create a memorable experience or avoid an awful experience for a customer, then you should do it.

If you're not comfortable giving your agents carte blanche to make exceptions, you can set parameters. Set up a system where you only break policy for your most loyal customers.

For example, there was a streetwear brand that I was very excited about a couple of years ago. I made around 10 orders in a span of a year and a half and I spent around \$1,000.

I had an incident where I ordered a pair of shoes from an Adidas collaboration marked as final sale. Even though I had the same pair of shoes at home, the same size in this pair didn't fit. When I reached out asking for a refund, they wouldn't give it to me.

If the CS team had looked into my account and seen that I was a top 10% customer, they could have made an exception for me.

But they didn't want to break policy because they were following a rule book. And they lost a really loyal customer.

I don't believe that teams should change the policy for everyone, but creating an exception for a customer who has hit a certain number of orders and generates over a certain number of revenue for the business makes a ton of sense.

Overall, take a look at your policies and the customers who have generated significant LTV for your company. Determine the threshold where you want to make policy exceptions in order to keep your most loyal customers happy.

## ♥ Apologizing

The number one powerful tool is an apology. Many people are so terrified of taking accountability and making it look like they messed up that they avoid apologizing.

In reality, an apology can be a powerful way to let the customer know that you're genuinely disappointed alongside them, and understand that this is an issue that needs fixing. It means you're ready to get creative to find a resolution that works for everyone.

Consider validating and empathizing by saying something like:

**“I know what it's like to try new brands and have the experience feel like an absolute mess. And this is not our best behavior.”**

## — Refunding

If somebody has the most awful experience ever, I don't want that to make the rounds. Sometimes it's better to spend the \$50 to get this person out of our inbox and away from public channels like reviews and social media. And that's mostly by gut.

The trick, though, is not to use refunding like a band-aid, cure-all solution. Sometimes a small refund can be more insulting to a customer than a real apology.

## 🕯 Transparency

When you can (and when it's approved by your legal team if you're a big corporation), share what's going on behind the scenes with an upset customer.

For example, at the luggage brand that I was at in the beginning of my career, we went above and beyond. We told customers what we'd been doing in the factory for the last 30 days and even sent a link to a YouTube video that showed us testing the luggage.

In that situation, we overloaded them with information because these people were backing a suitcase on Kickstarter that didn't exist yet. They wanted to feel like their investment was actually bringing a product to life — so that's what we gave them.

Most brands don't need to take factory footage. But some transparency around what went wrong and how the team is going about fixing it can go a long way. For example, a brand that's having inventory issues because of supply chain problems coming from their manufacturer.



# 07

## Learn effective skills to stave off burnout

When you deeply care, each unresolved issue or unhappy customer can feel like a personal failure. And when you meet these moments day in and day out, the emotional toll adds up.

This emotional juggling act is a reality for many of us in the CX profession. We're not just voices on the phone or names in an email. We're people who carry our emotional baggage. We bring our human hearts to work; sometimes, they get bruised there.

This is, unfortunately, part of CX work, but managing upset customers doesn't have to feel like walking on a tightrope above a pit of hungry alligators.



Let's dive into the strategies that can help manage these emotional ups and downs more effectively.

### Practice mindfulness

This isn't just a suggestion to "be present" or "live in the moment."

In the context of CX work, mindfulness means being aware of your emotional responses as they happen, understanding the triggers, and developing strategies to mitigate the negative impact.

This could look like recognizing when a customer's harsh words are starting to get under your skin, taking a moment to acknowledge that feeling, then deliberately choosing to respond calmly and patiently instead of reacting impulsively.

Being mindful is a skill that takes time to develop but is immensely rewarding, allowing you to manage your reactions and maintain composure during stressful situations.

### Create and respect boundaries

It can be tough to disconnect, especially in an age of hyper-connection. But it's crucial to designate "work-free" zones in your life, whether certain hours of the day, specific locations, or even mental spaces.

Remember, being constantly "switched on" doesn't make you a dedicated employee — it makes you a ticking time bomb of stress and burnout.

As a CX lead, it's essential that you model these boundaries for your team.

## **Understand what you can control and communicate it effectively**

You can't always fix everything, and that's okay. What's important is showing the customer that you're doing everything you can to help.

When I worked at my first brand, we could not expedite product deliveries because they were still in production. But we did everything else we could — we shared detailed factory reports, videos of product QA testing, and more with our Kickstarter backers.

This approach not only helps manage customer expectations but also gives you a sense of accomplishment and control in situations where the solution isn't straightforward.

## **Don't underestimate the power of peer support**

Share your experiences, both good and bad, with your colleagues. You'd be surprised how comforting it can be to know that others are grappling with the same challenges.

This can also open opportunities to learn new coping strategies and problem-solving approaches.

If you are a one-person or simply don't have a support network at work, consider setting one up with industry folks.

It can be as simple as a group chat or regular catch-up meetings where team members can share their experiences and provide mutual support.

## 🏆 Celebrate every win, no matter how small

It's easy to get lost in a sea of complaints and forget about the positive interactions you've had. Make a habit of acknowledging your successes.

A customer's issue resolved, a thank-you email received, a crisis averted — these are all causes for celebration.

Regularly reminding yourself of these small victories can boost your morale and motivation, helping you maintain a positive outlook even when things get tough. For CX leads, this could also look like shouting out wins in meetings and Slack channels. An agent getting recognition from their manager can boost morale individually and across an entire team.

## 🧘 Invest in self-care

This isn't just about bubble baths and scented candles (although, who can resist a good sage candle?). Self-care is about caring for your physical, mental, and emotional health.

This could mean regular exercise, a balanced diet, ample sleep, or engaging in activities that help you relax and rejuvenate.

It might seem obvious, but it's surprising how often we neglect these basic needs, especially when busy or stressed.

Remember, you can't pour from an empty cup — taking care of yourself is beneficial for you and crucial for your ability to support your customers effectively.

The emotional gauntlet of CX work can be brutal. But with conscious effort, the right strategies, and a supportive work environment, it's possible to survive and thrive in this space.

And remember: it's okay to have bad days. They're just as much a part of the journey as the good ones.

# Drive revenue with great CX

**Delivering exceptional customer service isn't just about addressing inquiries.**

It's a reimagining of your brand's overall experience that directly impacts your financial success. Try these tactics to boost and tie revenue back to your CX program.

# 01

## Encourage repeat purchases

Creating a strong retention strategy on your CX team will help you drive revenue and create a network of loyal customers.

### Provide swift problem resolution to boost customer loyalty

The CX team is the frontline when things go wrong, and how you handle hiccups can make or break your customer relationships.

Quick and efficient problem resolution not only satisfies your customers, but also strengthens their loyalty.

When you think deeply about retention on your CX team, you can develop strategies that minimize customer churn during crises.

Hypothetically, imagine CX notices a delay with orders getting shipped out and adds a one-liner in email confirmation notifying customers about a potential delay. This one line in your order confirmation email sets expectations so customers have a good experience. It also sets clear expectations and lets them know that you're already aware of what can be a frustrating problem.

### Use data to enhance retention campaigns

Your CX team has the 411 on what your customers love about your product and what they'd like to see improved. Use the in-depth insights about customer preferences, pain points, and buying behaviors you collect in your helpdesk (like Gorgias) to inform future campaigns.

Customer data is invaluable for your retention, marketing, or sales team when crafting targeted re-engagement and win-back campaigns and creating educational content post-purchase to ensure they know how to use the products they ordered.

# 02

## Create memorable moments

In general, customers remember moments because they cause a moment of happiness after they use your brand's products.

How exactly do you do it? You introduce surprise and delight into to the buying journey instead of sticking to the script. You want to delight customers with memorable moments — without overdoing it to the point of being predictable.



When I worked at OLIPOP, one of my favorite moments was when a customer ordered 20 cases of OLIPOP for her wedding. However, our shipment was cutting it close to their wedding date. To compensate for the panic our newlyweds might've been feeling, we asked them for their wedding registry and got them a shiny new waffle iron. Here's their response:

"Hey Olipop Team!

I wanted to say a big thank you for your unexpected and incredibly sweet wedding gift! What a big surprise! Your gift was actually the very first one we received. It really kicked off the feeling of excitement for our big day! We've been making waffles almost every weekend and they're perfect every time. We can't thank you enough! First for your help getting us stocked with Olipop for the wedding, and then this thoughtful gift! You'll be a part of our lives for a very long time to come!"

x Marissa & Rob

# 03

## Boost onsite conversions

When you give potential customers speedy pre-purchase support, it helps unblock sales. For example, questions like, “Could you fulfill 20 cases of OLIPOP for my wedding?” or “Will this show up by my sister's birthday?” or “When you say your makeup is vegan, does that include XYZ?” are usually all that stand in your way from converting that customer.

A well-integrated customer service strategy can remove obstacles in the flow of shopping and can push browsing customers into making their purchase.

Because Jones Road is mostly DTC, we run into many customers asking, “what shade am I?” when they’re looking to purchase a face product. In talking to customers, we have seen that to be one of the most significant objections to buying makeup online.

But what if we could hire professional and experienced makeup artists to help folks choose their perfect shade by sending in a selfie online? And offer a no-questions-asked 30-day return policy in case they don’t like it?

We brought fantastic makeup artists to the team, some with prior CX experience and others that we trained on the CX side of the house. And we started tagging the folks we shade-matched in Gorgias under tag #shade-match. There were only a few customers at first.

After a few months of collecting this data, we used Peel Insights to track those groups of customers against others in their same cohort.

**90-day lifetime value (LTV) for customers shade-matched through the CX team was 78% above our standard LTV, and 6-month LTV was up by a staggering 111%.**

Now, I know the growth people reading this are already doing math here. But folks, it's not just about the extra money from these customers.

We can also assume that customers that purchase and love their product have a higher chance of telling their friends and becoming brand evangelists.

FROM Sydney From JRB <hi@jonesroadbeauty.com>

SUBJECT Just checking in

Hi Eli,

It's Sydney from Jones Road Beauty :)

If you're interested, I am more than happy to help shade match you to make sure you get the right shade of?

Simply [reply to this message](#) with a makeup-free selfie in natural light, and we will help recommend products for your complexion and skin type.

We completely understand if this option isn't for you. We also have a Customer Experience team trained in all thing JRB that can answer any questions you may have.

Looking forward to hearing from you!

PS. We can process [free returns and exchanges](#) within 30 days of purchase, excluding kits and apparel, if your items don't work out for you.

Xx

Sydney  
Customer Experience Lead, Certified Makeup Artist

In the last 12 months, 82% of first-time customers that were shade-matched by our CX team have purchased again. So we have now started pushing folks to shade matching through specific flows and campaigns.



# Automation and the future of CX

**The question I get often is this:  
With all this AI and technology,  
are you scared of CX jobs  
disappearing?**

My answer is simple: No.

I'm really excited to be able to ruthlessly automate repetitive tasks, and then put a much larger focus on the human magical touches and moments we can create with our customers.

In order to balance out the automation you need to set up to support your team with the real, person-to-person relationships you're building with your customers, keep these things in mind:

## ✔ Ensure automation actually solves the problem

As a business, there's so much focus on saving time and money. But is the automation you set up getting customers the information they want, or are you just going to frustrate your customers even further?

For example, allowing customers to track order status with Gorgias so they don't have to write in (and our team can focus on more interesting interactions).

In contrast, you could implement a chatbot that responds to 99% of customer inquiries for your team. But if it doesn't actually help customers solve their problems, they'll be 10x more frustrated than when they started.

**Utilize automation only when it serves your customer as well, not just to save money.**

## 🗨️ Make it easy to speak with a human

As I am sure every one of you knows from personal experience, there's nothing more frustrating than feeling stuck in an automation loop with no way out. It's crucial to build automations so that customers can chat with a human representative if they would like to.

If your automation can't solve an issue, ensure that customers are able to easily connect with a real representative.

**When customers want to engage with a brand, the only way they'll feel like there's trust in the relationship they're building is to talk to a person.**

# Re-writing the script



Thanks for tuning in and taking the time to read this guidebook.

I've been thinking deeply about these concepts for years. The truth is, the key to unlocking truly great CX is caring about your customers. It's that simple.

CX is not just a department: it's the voice of the customer across your organization. It can be the tipping point that turns brand neutrality into brand advocacy.

But most CX teams aren't inspired — they're just tired. And as you've seen throughout this guidebook, there's so much we can do as leaders and team members to make a difference.

Traditionally, the "big seats" at the corporate table have been reserved for roles focused on Finance, Operations, Marketing, and Sales. However, as the significance of customer experience continues to escalate, it's evident that CX deserves a spot.

The key to making a paradigm shift is in empowering support teams to actually change each customer's experience with your brand, and showing the increase in revenue that comes from that.

I encourage you to implement these strategies at your organization and keep track of how things change over time. I'm looking forward to seeing a real shift in this industry over the next couple of years. We have a long way to go, and we're just getting started.

Eli

Eli Weiss

