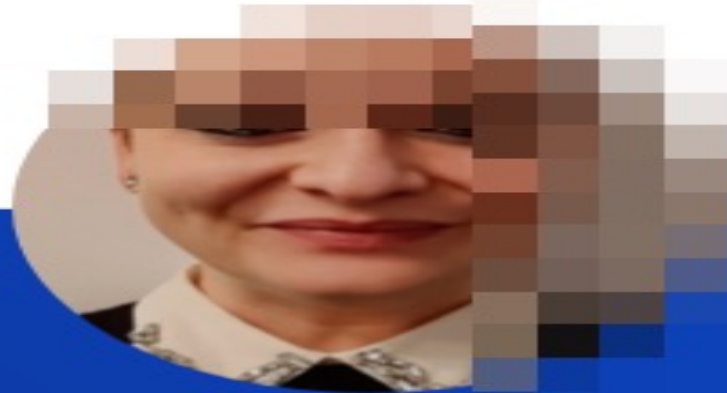


Speakers:



Ashley S. [redacted]
Sr. Director, [redacted]
Succ [redacted]



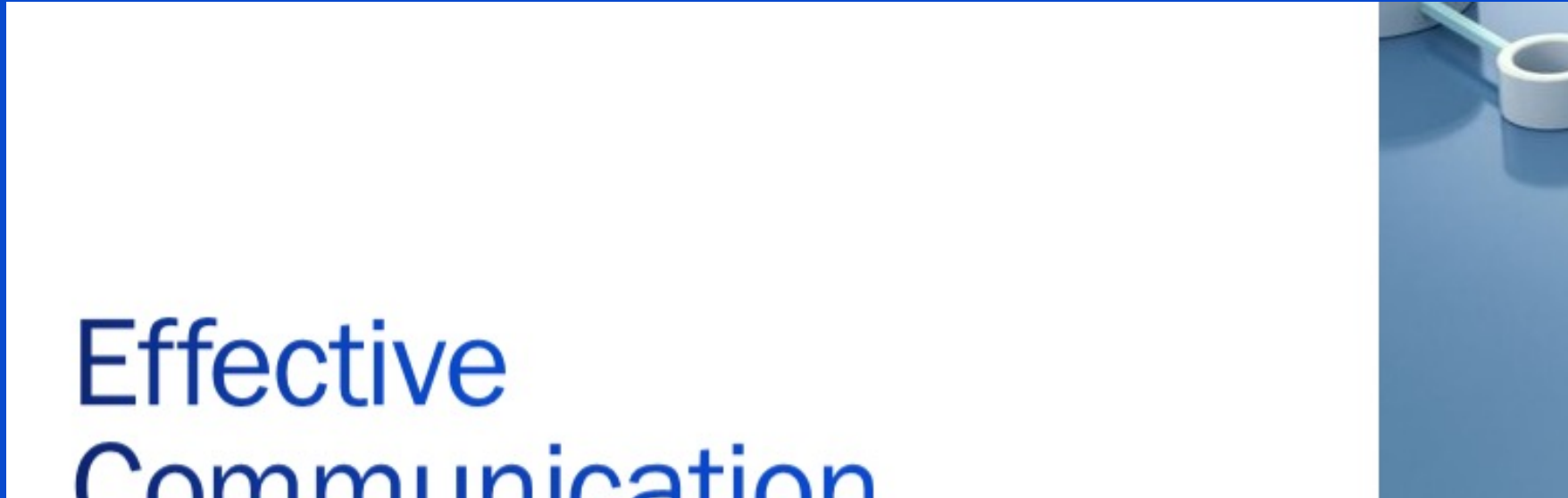
[redacted] **Mag [redacted]**
Director, PM [redacted]



Kayla Chrysler
Director, Onboarding



[redacted]
Director, Customer
Success

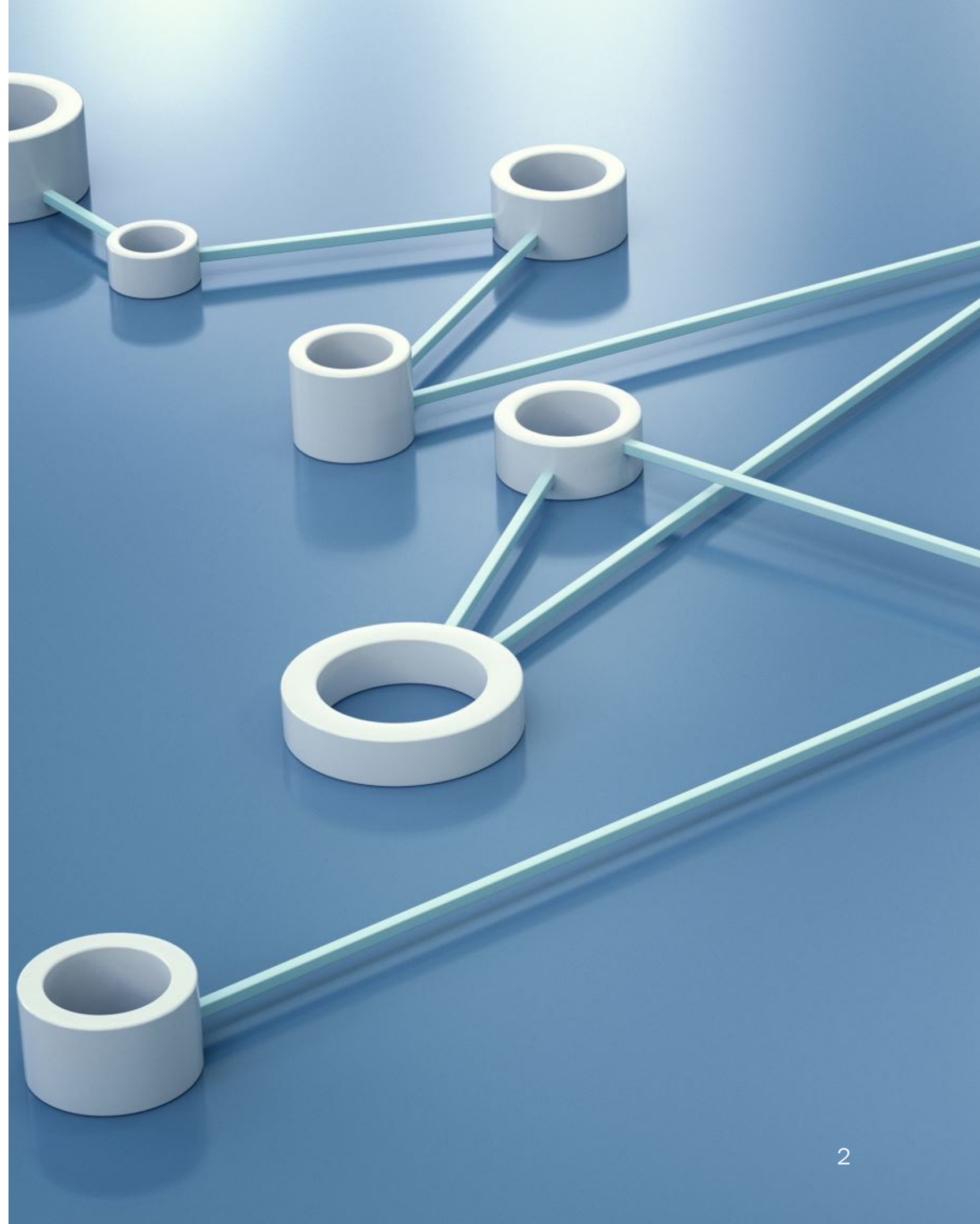


Agenda

- Video – The Evolution
- What Is Effective C
- Verbal Communication
 - The 5 C's Of Eff
 - Email Etiquette
- Non-Verbal Communication
 - Engaging Custo
- Active Listening

Effective Communication

Soft Skills Training





Ashley Sierant

Sr. Director, Customer
Success



Emoke Magyari

Director, PMO



Kayla Chrysler

Director, Onboarding



Loic Peron

Director, Customer
Success

Agenda

- Introduction
 - Video – The Evolution Of Communication
 - What Is Effective Communication
- Verbal Communication
 - Improving Verbal Communication (Spoken)
 - Improving Verbal Communication (Written)
 - Email Etiquette
- Non-Verbal Communication
 - Engaging Customer Interactions
- Active Listening



Introduction

The Evolution Of Communication





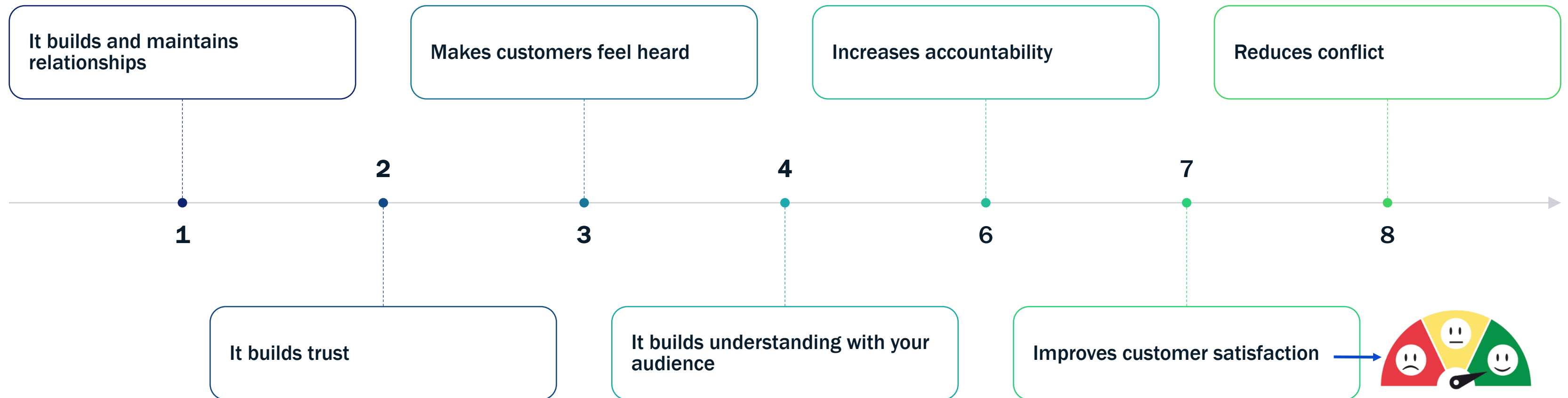
What is Effective Communication

Effective Communication

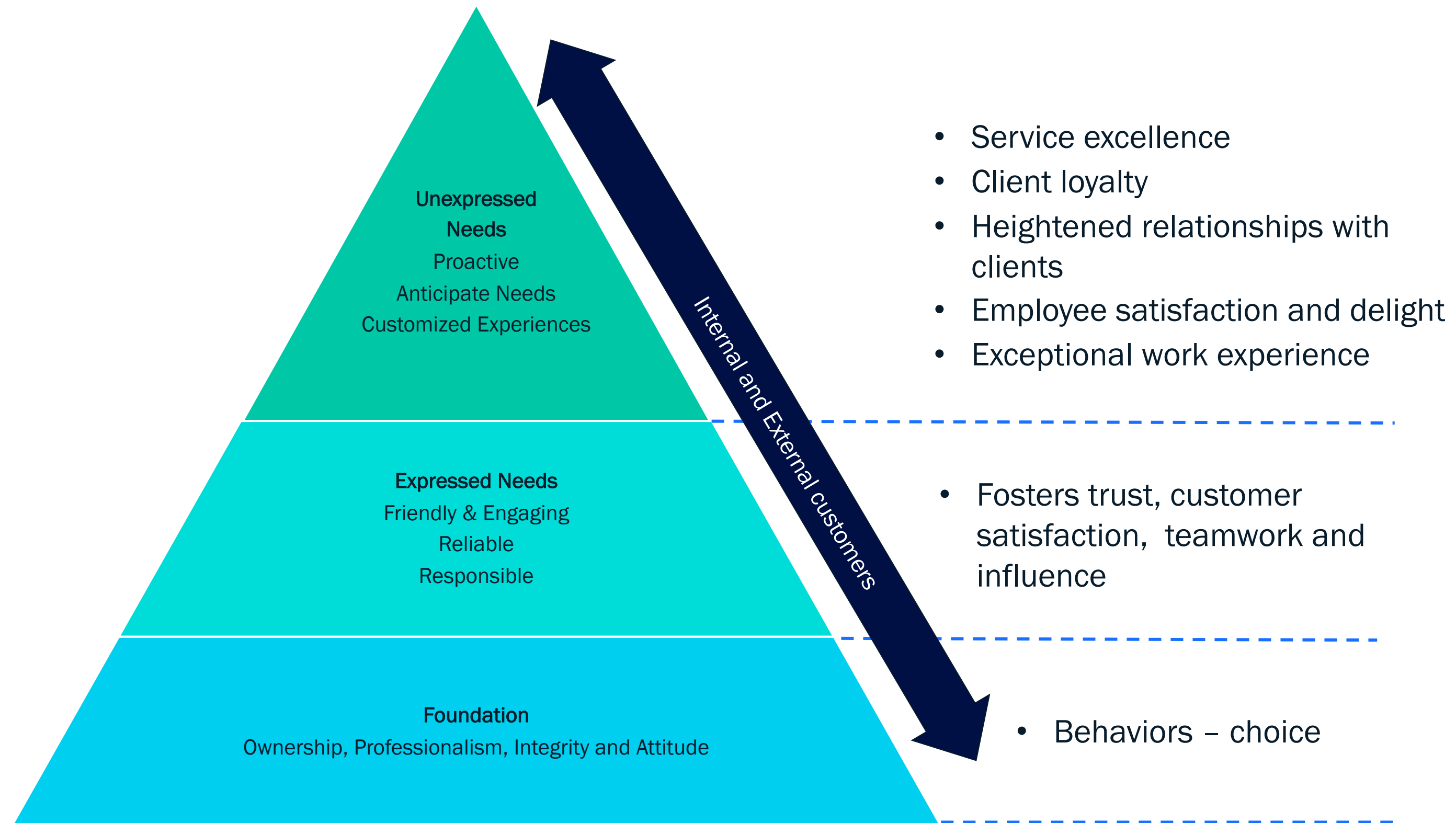
What it is and Why it is a Critical part of Customer Success

Effective communication means having the ability to listen attentively and to convey information efficiently and with empathy. **Effective Communication has a positive impact on your career and relationships.**

Why communicating effectively with our customers is so important:



FUNDAMENTALS OF EXCEPTIONAL COMMUNICATION





Verbal Communication

Your WORDS whether its written or spoken. It's
WHAT you say

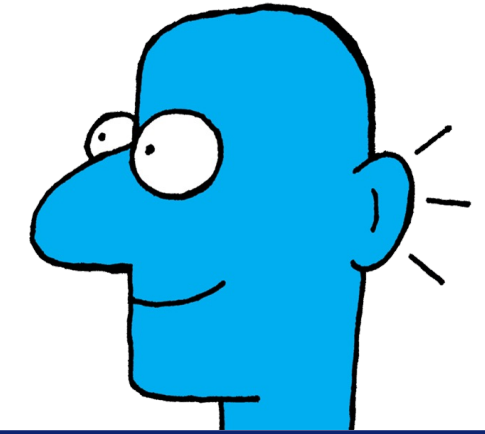
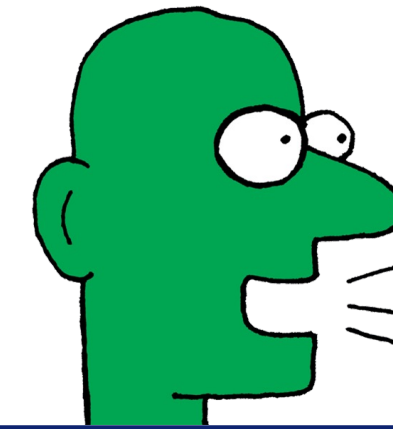
Non-Verbal Communication

HOW you say it. Your tone, your setting, being
friendly & engaging, How quickly you respond,
are you smiling when you are speaking, do you
mirror the customers urgency (or lack of)



Verbal Communication

Improving Verbal Communication (Oral)



01

Think before you speak.

02

Be clear and concise.

03

Speak with confidence.

04

Be an active listener

05

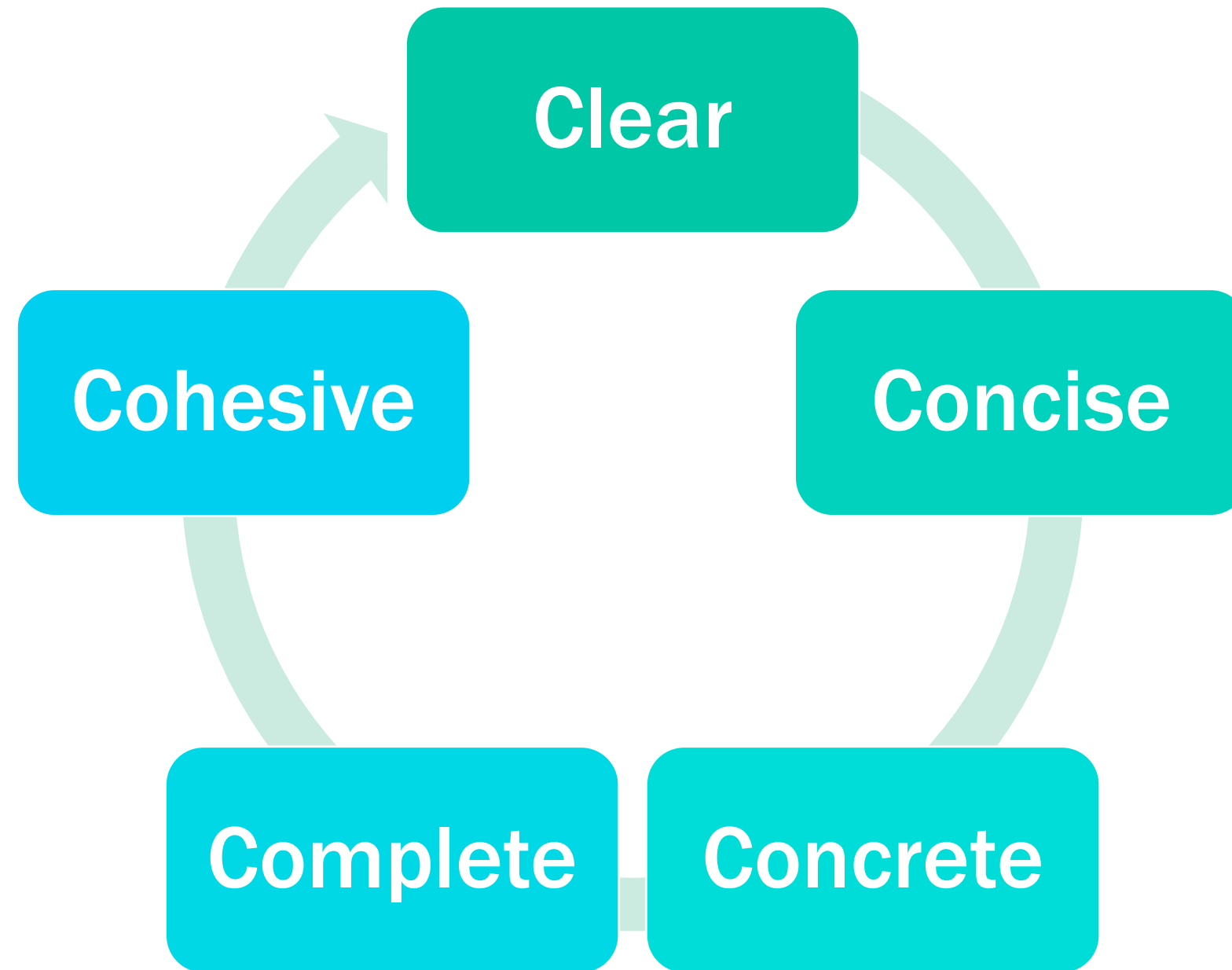
Be aware of non-verbal communication cues

06

Think about the perspective of your audience

Improving Verbal Communication (Written)

5 C's of Effective Communication



Which do you prefer?

HubSpot was founded by Brian Halligan and Dharmesh Shah at the Massachusetts Institute of Technology (MIT) in 2006. Shah invested \$500,000, which was followed by angel investments from Edward B. Roberts, the chair of the Entrepreneurship Center at MIT and fellow MIT Sloan classmate and Entrepreneur Brian Shin. The company introduced the HubSpot software in beta in 2006 and officially launched it in December 2007. An additional \$5 million in funding was raised in 2007, which was followed by \$12 million in May 2008, and \$16 million in late 2009. The company grew from \$255,000 in revenues the first year the software was released to \$15.6 million in 2010. Later that year HubSpot announced its acquisition of oneforty. Oneforty began as an app store for Twitter, but shifted into an online resource for social media marketing. The company also introduced new software for personalizing websites to each visitor. According to Forbes, HubSpot started out targeting companies of 1–10 employees, but "moved steadily upmarket to serve larger businesses of up to 1000 employees."

175 Words

Founded by Brian Halligan and Dharmesh Shah at MIT in 2006, HubSpot received a series of multi-million dollar capital injections that helped it grow more than 60X in its fourth year of business. That same year, HubSpot announced its acquisition of oneforty, introduced new website-personalization software, and began targeting enterprise businesses.

51 Words

Email Etiquette



- Use common courtesy: Hello, Hi, Dear, Thank You, Sincerely, Best Regards.
- Always have a sign off that includes our name with every e-mail. “Regards, (name)”.
- Type in full sentences with proper sentence structure. Not all caps; not all small case; not a lot of exclamation points or bold text. Proper capitalization and punctuation are a must. Pro tip! Sign up for a [Grammarly](#) account
- Respond to client emails **same day** even if its just to let the client know we will get back to them at a later time.
- Update out of office when not available and provide an alternate contact if needed.
- Summarize what we have done for the customer being extra careful to not leave anything out.
- Make sure to address all their needs and questions in your follow up email.
 - Tip: cut and paste their email into your reply and respond to each request to ensure you have captured everything. Then, be sure to delete your paste.
- *Do not hide behind email* when dealing with a difficult situation. ***Pick up the phone and call unless otherwise specified by client.***
- Do not forward internal emails (as answer to a question or issue) or use internal jargon/acronyms that will only leave the client confused. This is very important.
- Be sure to have a short SUBJECT: that indicates clearly what the topic of the email is. Typos, all caps or all small case can lend to the impression of spamming or simply unprofessional.

EMAIL ETIQUETTE



- Make sure the contact's name is formally typed in "To:" field. John B. Doe – not john b doe or JOHN B DOE...
- Use the "cc:" field when there are a handful of contacts involved in a discussion that requires all being on the same page.
- Use "reply to all" with discretion. Carefully think about whether "all" really need to be aware of your reply to conduct business. Never use this to CYA or tattle on a coworker or colleague – doing so will make us look petty while increasing others e-mail volume unnecessarily.
- Don't label an email urgent unless it really is. If a customer labels an email as urgent – treat it as such!
- Don't send an email when you are angry or upset.
- Never find a previous e-mail from the party we want to communicate with, hit reply and start typing about something completely irrelevant to the old e-mail's subject. Always start a new e-mail with the relevant subject in SUBJECT: field.



Activity

Customer Email

FROM: Jane Doe (Customer)
SENT: Wednesday, May 4
TO: John Deer (CSM)

Hi CSM,
Hope you are doing well. I am really struggling reading the new log file in DemandTools. Can we schedule some time for you to walk me through the changes? I really think that would help get me moving in the right direction.

Overall, the new version itself seems a bit overwhelming. Not sure where to start or how to prioritize my needs. I seem to be spinning around at bit.

Thanks,
Jane Done
Sr. Salesforce Administrator
ABC Company

CS Response

FROM: John Deer (CSM)
SENT: Monday, May 9
TO: Jane Doe (Customer)

hey,

As you know, we have a new article on logs from our K&T. Liking that below. Should help you be able to read them. Sorry to hear your having issues with the new version. ☹️ Others have found that with time it becomes easier. Practice makes perfect!

Tx,
JD

More Appropriate Response

FROM: John Deer (CSM)

SENT: Wednesday, May 4

TO: Jane Doe (Customer)

Hello Jane,

Great to hear from you. Sorry to hear you have been having a hard time with the new logs. I am happy to jump on a call. Below is a link to my calendar, feel free to select a time that works for you. In the meantime, we do have some new support articles on log files, I am linking those as well in case you want to review in advance of our meeting.

Calendar Link

Article Link

Regarding your struggles with the new version in general, let's discuss that in depth when we meet and come up with a plan of action. There are a few training options that might be helpful, or we can schedule some follow up deep dives on a few modules. Let's figure out what will be best to get you moving in the right direction!

Thank you,

John



John Deer

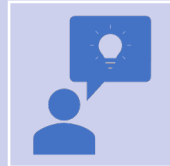
Customer Success Manager

Validity, Inc

Non-Verbal Communication

- Engaging Customer Interactions
 - 7 Ways to Make Customers Happy With Non-Verbal Communication
 - Visual Communication
 - Video Communication
 - Body Language & Tone Of Voice

Tips to Make Customers Happy with Non-Verbal Comms



Communicate Concisely: Only give relevant information to help your customers find the answers to their questions fast and efficiently.



Remain Positive! Don't come across as blunt or as though you're trying to get rid of them altogether.



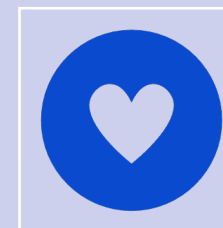
Understand the Customer: When you're reading a message from a customer, it is **CRUCIAL** that you're reading the message they've sent you, rather than simply skimming over it. Before you take any action, or even reply, make sure you are fully aware of what they are talking about.



Ask the right questions! Sometimes we are hesitant to ask questions for fear that it will make them look like they don't know something. It is important to ask questions so you can completely understand your customer's needs. Doing so allows you to address the problem or question correctly the first time around, minimizing the risk of mistakes or miscommunicating.



Accuracy of Content: Avoid typos, grammatical errors, and other writing mistakes. Not the best with Grammar? [Grammarly](#) is a great resource that's free!



Being Empathic: Often when a customer contacts you, they may have a question about something, or they're experiencing a problem with some part of your process, product or service. Put yourself in their shoes and try to be as empathic and understanding to the customer's concerns



The Power of Persuasion: A customer may be asking you a question and you need to convince them to take a certain action. This is where your powers of persuasion come in as you'll need to subtly edge your customers into a certain direction.

Visual Communication

Visual communication is the practice of using visual elements to communicate information or ideas. Types of visual communication include animated GIFs, screenshots, videos, pie charts, infographics, and slide deck presentations.

Getting your message across in a clear, concise way can be difficult with words alone. By incorporating visuals, you can save a lot of back and forth due to confusion.

Stats have shown that visuals are processed 60,000 times faster in the brain than text.

[3 Ways Screenshots Improve Your Word Docs, PowerPoints, and Emails](#)

[5 VISUAL COMMUNICATION MISTAKES ALMOST EVERYONE MAKES](#)



Video Communication

Virtual meetings, speeches, presentations and conferences are the normal for a lot of us. Even though so many of us are spending so much time on Zoom, there are some common mistakes that people – even experienced communicators – are still making. Here they are:

- **Not enough eye contact with the audience. The fix: Look at your camera, not your screen**
- **Vocal monotony. The fix: Make sure there's variety in your voice**
- **Winging it or reading from your notes. The fix: Rehearse in advance**
- **Going overboard on slides. The fix: Use your slides effectively**
- **Inviting your audience to look at all the titles on your bookshelf. The fix: Choose a non-distracting background**
- **Lighting that's too bright or too dark. The fix: Sit in the right spot in your room**
- **Letting everyone turn off their video. The fix: Encouraging your audience to stay on camera**



Body Language

Body language is the use of physical behavior, expressions, and mannerisms to communicate nonverbally, often done instinctively rather than consciously. This includes:

- Eye contact
- Handshake
- How you sit
- Are you engaged?
- Proper desk posture
- Facial expressions
- The way you stand
- Tone of voice





Listening



sometimes
we forget
to
listen....

Active Listening

Rather than giving someone a fraction of your attention, active listening is making a **conscious effort to hear, understand, and retain information** that's being relayed to you.

It involves more than listening to the words they say. Instead, you consciously **analyze what you hear, and try to pick up on intent, content, and emotion** from the speaker.

The other side of active listening is making sure the other person knows that you're doing so. We can all tell when we're speaking with someone who is zoned out. Even if they're paying attention, cues like **eye contact, verbal acknowledgement, and replying with insightful comments** matters.

- **Pay attention:** focus on what they want you to hear
- **Show that you are listening:** they can tell if you're paying attention
- **Offer feedback:** be ready to respond thoughtfully
- **Don't jump to conclusions:** ask clarifying questions, rephrase



What Is Inside Their Heads?



I am new to this role, and I need to learn so much



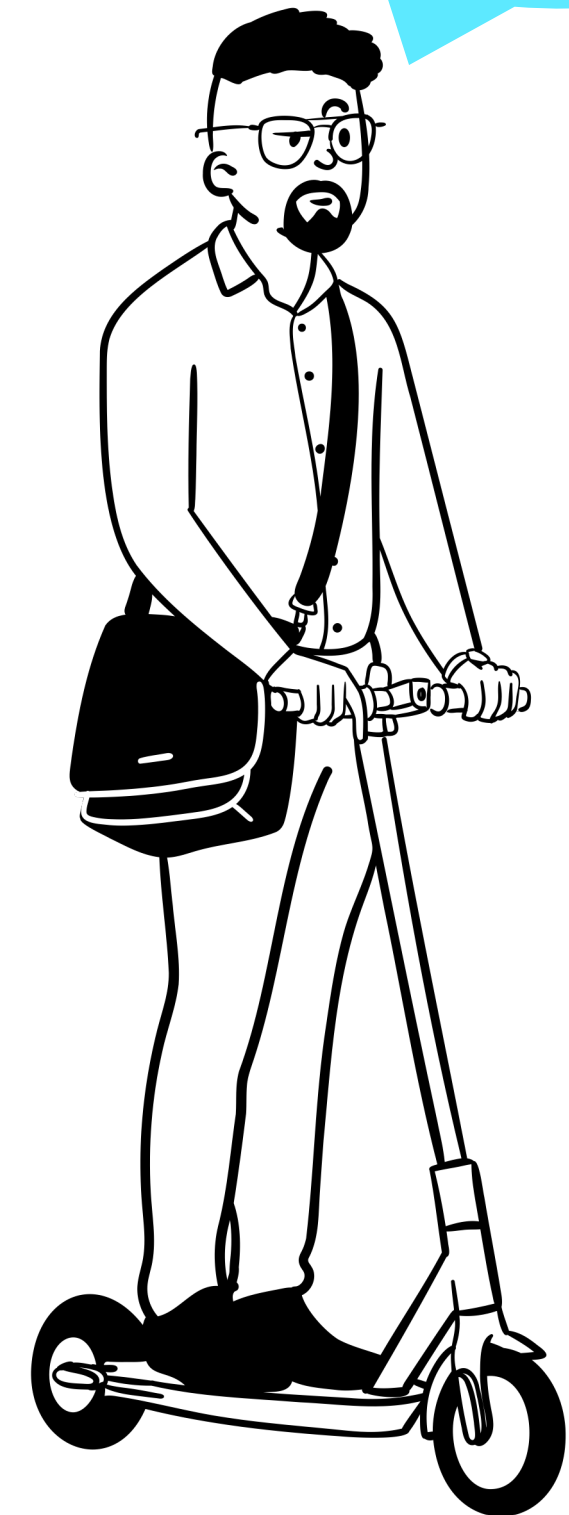
I think that I am already an expert and there is no value you can add



I do not feel recognized in my role, and I need help adding value

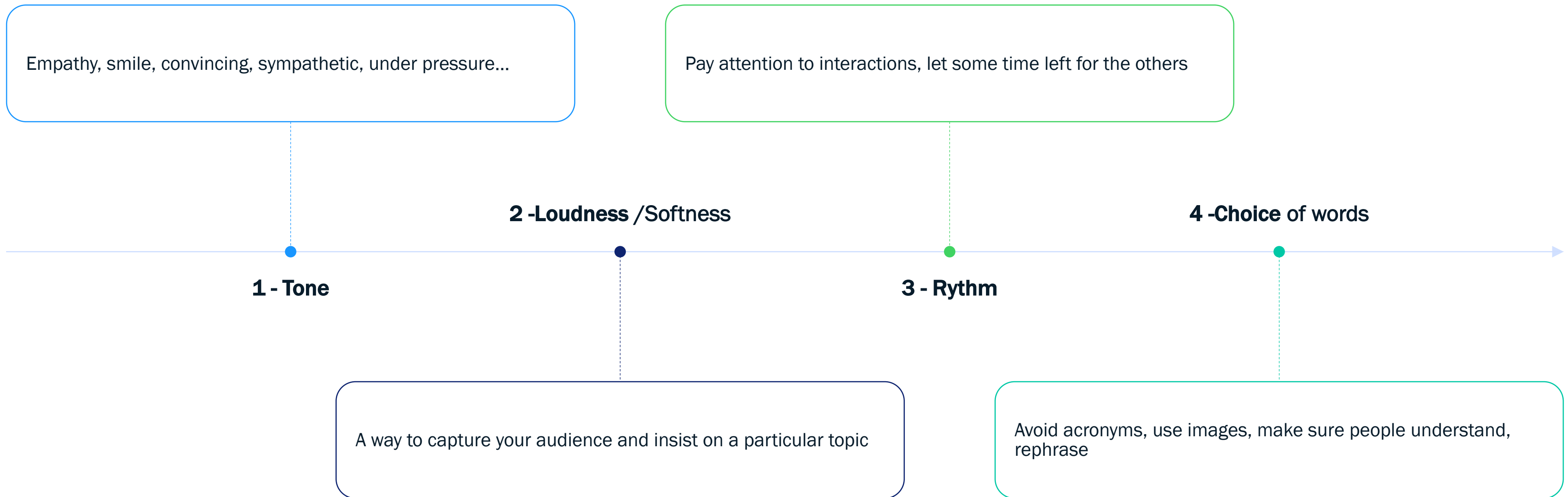


My company has been acquired and I am scared for my future



My management is putting a lot of pressure on me, and I need to justify my value

4 Ways to adapt your communication





Appendix

Clear

Clear communication means easy-to-read and easy-to-understand messages.

Clear is the most part important of good communication. If your thoughts are not clear, your message will not be clear, and your audience will not understand your message. Your readers might give up altogether or form an understanding that is contrary to your objective.

Clarity in communication has following features:

- *It makes understanding easier.*
- *Complete clarity of thoughts and ideas enhances the meaning of message.*
- *Clear message makes use of exact, appropriate and concrete words.*

Concise

Conciseness is communicating what you want to convey in least possible words.

Concise communication has following features:

- It saves a customer's time
- It underlines and highlights the main message as it avoids using excessive and needless words.
- Concise communication provides short and essential message in limited words to the audience.
- Concise message is more appealing and comprehensible to the audience.
- Concise message is non-repetitive in nature.

Concrete

Concrete communication implies being particular and clear rather than fuzzy and general.

Concrete messaging has following features:

- It is supported with specific facts and figures.
- It makes use of words that are clear and that build the reputation.
- Concrete messages are not misinterpreted
- Strengthens the confidence in messaging

Complete

When presenting an idea, include enough information to prove your thesis. Make sure to convey all facts required by the audience.

A complete communication has following features:

- Complete communication develops and enhances reputation of an organization. No crucial information is missing the amount of follow-up is reduced if the communication is complete.
- A complete communication always gives additional information wherever required. It leaves no questions in the mind of receiver. Depending on the use case, you might consider adding a clear call to action
- Complete communication helps in better decision-making by the audience/readers/receivers of message as they get all desired and crucial information.
- It persuades the audience.

Cohesive

Cohesiveness is the quality that makes it easier for your audience to read and understand important messaging.

Cohesive messaging can include some of the following tools:

Repetition:

Helps to enhance a reader's understanding of what the author has written. Pointers are used as a tool in sentences to use repetition for better understanding.

Pointers are words, phrases, or ideas that appear in a sentence, and are repeated in the next.

Example: Epilepsy is a brain or neurological disorder where excess electrical energy causes seizures. Seizures result when the brain's nerve cells, or neurons, produce an excessive or abnormal amount of electrical activity. Depending on this activity...

Example: Depending on this activity, three results may occur. First, the seizure may start and stop in one location. Next, it may spread a bit and stop. Finally, it may go through the body's nervous system before stopping

Tone Of Voice



Listening



