

Keeping Focus on the SMB Mindset as Your B2SMB Business Scales

A B2SMB Playbook: Best Practices for Winning, Keeping & Growing Small-Business Customers



Playbook Contributed by

RUBY
receptionists



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About B2SMB Playbooks

B2SMB Playbooks provide actionable solutions to some of the most common issues in B2SMB sales, marketing and operations. We've enlisted some of the brightest minds in SMB-focused solutions to share their best tactics.

Who should use this Playbook? B2SMB practitioners responsible for marketing, sales, product development, customer service or delivery of solutions to small-business customers.



JILL NELSON

Chief Executive Officer
Ruby Receptionists

Playbook Contributor

A driven entrepreneur passionate about growth through exceptional service, **Jill Nelson** has grown Ruby Receptionists into a four-time winner of FORTUNE magazine's Best Small Companies to Work for, and a Fastest Growing Companies in Oregon recipient for the past eight years.



Abstract

The Problem: B2SMB founders often **start with an intimate knowledge of what their customers care about** — but as they find **success** and more staffers are hired to meet demand, **that intimacy can be lost**. At Ruby Receptionists, empathy among employees for small-business owners is a big part of what sustains the business.

The Process: During a period of extremely high growth, Ruby's managers needed to focus new employees on the most basic function of their role — understanding the needs of the SMB.

The company created a process for employees to autonomously deliver on **the mission of making personal connections and creating “WOW” moments for customers**.



Abstract

The Solution: To connect employees to what it's like to own, run, and work in a small business, the Ruby executive team initiated an "annual theme" around which programming would be oriented as the year progressed: **"In Our Customer's Shoes."**

The annual theme served as the emotional rally cry to drive business goals, results, and greater employee engagement.

The Result: Celebrating "WOW Moments" and creating the campaign to focus their receptionists on "In Our Customer's Shoes" **elevated the company's NPS score and its CSAT score — and brought Ruby's employees closer to customers and the mission of its service.**



Introduction

In the early days, when **Ruby Receptionists** was small and scrappy, everyone on the team understood the pressures of running a small business that their customers faced. **But over time the company realized it needed a mechanism to help new employees more viscerally connect with their customers.**

To that end, **Ruby started a “WOW Program,” where every employee was empowered to personally follow up on a meaningful personal connection they had with a customer with a handwritten notecard, personally selected gift, or video message.**

It also created a **yearlong program to connect employees more intimately with what it’s like to own, run, and work in a small business.**

Ruby Receptionists’ playbook for keeping a focus on the SMB mindset shows how **B2SMB companies can develop a strategy around continued customer connection and meaningful engagement that pays dividends, even as the company scales.**



The Situation

What is more basic to a B2SMB business than understanding the needs of the customers? It seems easy enough when you are a small team starting out, but it can become more and more difficult as you add more employees and layers of management.

Ruby Receptionists was founded on the concept that missed calls for SMBs are missed opportunities. The price of a missed phone call is missed revenue, of course — but nonetheless the demands and resource constraints small-business owners face often force them to neglect their best sales opportunities. **Depending on the type of business, these kinds of missed calls could potentially mean thousands of dollars in lost revenue.**



Growing Pains

Ruby found success, scaled quickly, and then kept growing.

The company was the first in Oregon to make the “Fastest Growing Private 100 Companies” list 11 year in a row.

And as that growth began to build, it became increasingly obvious that employees all needed to be on the same page when it came to understanding the company’s customers.

“At our size, we have to work strategically to help our employees identify and understand our customers — what life is like as a small business owner,” said Jill Nelson, the founder and CEO of Ruby Receptionists.

This understanding is key to the company’s service proposition, so it’s no small matter.



The Approach

As the company sought to help employees better connect with SMB customers, it created **two major initiatives** to drive these points home:

- A **“WOW Program”** to help its employees cement close connections with customers
- An **“annual theme”** designed to help employees focus on company goals



Major Initiative #1

1. The Wow Program

The first initiative was fairly simple. The “WOW Program” created a budget for employees to follow up with a handwritten notecard, personally selected gift, or video message when they felt they had a personal connection with a customer.

- Every employee was given access to the corporate Amazon account, and was **empowered to purchase a gift for the customer** inspired by the personal connection.
- **The company keeps a “WOW log”** to ensure employees don’t over-gift (criteria is just one WOW gift per customer, per quarter), but **employees can write as many notecards and create as many videos as they like**. Employees have entertained with songs, poems, and even skits that relate to the personal connection.
- The company also has **“WOW Stations” stocked for express WOWing for frequent connections** — such as get-well kits, baby onesies, coffee, and local Portland boxes.

"An annual theme should be focused on one idea, memorable, and measurable."

Major Initiative #2

2. Annual Theme

The second initiative was more involved.

At the company's annual kickoff meeting in 2017, the Ruby Receptionists' executive team selected **"In Our Customer's Shoes"** as an annual theme.

*"The annual theme serves as **the emotional rally cry to drive business goals, results, and greater employee engagement**," said Nelson. "An annual theme should be focused on one idea, memorable, and measurable."*



Annual Theme Goals

The goals of the “In Our Customer’s Shoes” theme included inspiring employees to:

- **Identify** with the psyche of small business owners
- Feel a sense of **ownership** in creating success for our customers
- Take **pride** in helping the “little guy”
- Get **curious** about the human interest stories of our customers
- Understand what **motivates** our customers



Internal Rollout & Employee Engagement

The Small Business Game of Life

To give employees a visceral experience of what it's like to own/run/work in a small business, at its annual kickoff meeting, **Ruby created a "Small Business Game of Life."** This game included constant interruptions, difficult decisions (without a lot of data), competition, HR issues, marketing, selling, servicing customer and designing and building products.

The company divided up into 60 teams of 6 employees, and assigned them businesses in various sectors including law, financial services, marketing, IT consulting, real estate, construction, and accounting.

Teams started with \$3,000 cash (Ruby play money) and each team completed 9 challenges, sold products or services to other small businesses and completed a Statement of Cash worksheet.

The winners were the teams within each industry with the highest ending cash balance.

"The game was organized, but chaotic, hectic and stressful."

Internal Rollout & Employee Engagement

A controller on each team kept track of money flowing in and out of the business, and **challenges included buying and selling products from other teams as well as other life interruptions.**

"The game was organized, but chaotic, hectic, and stressful," says Nelson. *"Players had to interact with new people, make decisions with little information, work at a fast pace, make sense out of chaos, figure things out quickly and on the fly. Employees reported the experience as stressful, anxiety inducing, and some said it was fun. Mission accomplished for creating a visceral experience of walking in the shoes of a small business owner."*



Internal Rollout & Employee Engagement

In addition to the Small Business Game of Life, Ruby's 2017 Annual Kickoff event also included:

- employee written and directed small-business skits, and
- a pitch fest where Ruby employees pitched their business idea.

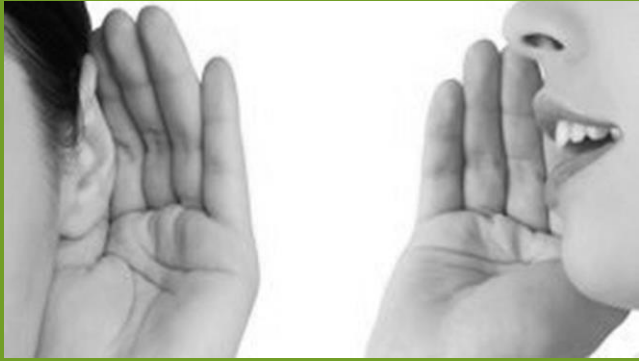
Then **the theme was operationalized and socialized throughout the year.**



Year-Long Campaign

“In Our Customer’s Shoes” activities throughout the year included:

- **Customer 20 Question videos** were produced and viewed by all teams. Questions were framed around small business ownership and life in general. Including everything from “What keeps you up at night?” to “What’s your favorite swear word?” Teams hosted viewing parties and shared their reflections via a sticky note exercise.
- The company also **operationalized the “In Our Customer’s Shoes” theme in new employee onboarding**. One example of content was a “choose your own adventure” web-based game — a simplified/digital version of the Small Business Game of Life. Players had to make choices throughout the game and either won the game by making a profit, or losing the game by ending in the red.
- Ruby also ran an **11-week campaign asking employees to reflect on what it’s like to live the life of a small business customer**. Each week, employees received a new question and token to represent that question. Team members posted their reflection questions to a giant wall in Ruby’s community areas.
- Ruby ran a **social media campaign asking customers to share photos of their workspaces and everyday life in their office**. The company received enough photos to run a blog post every Tuesday in 2017, sharing the photos, thoughts and stories from customers.



The Last Word

"Creating a culture that promotes and organizes employee engagement has paid off for Ruby in customer satisfaction and retention. Word-of-mouth referrals was our single greatest source of inbound leads for years, and our employees are truly driven to create exceptional customer and caller experiences."

Jill Nelson, CEO, Ruby Receptionists



About Ruby Receptionists

Harkening back to an era when every call made to an office was answered by a friendly receptionist, **Ruby Receptionists** provides personalized live, virtual receptionist services to thousands of small businesses throughout North America.

The company's mission is to preserve and perpetuate real, meaningful connections in an increasingly technology-focused, virtual world. Ruby is the only virtual receptionist service dedicated to creating personal connections on every call—making callers feel special while making its small-business customers look good.

Ruby Receptionists' mobile app and other innovative tools make it easy for customers to manage their calls, messages, and Ruby service as a whole. By pairing delightful receptionists with leading-edge technology, Ruby has been built into the perfect platform to help small businesses deliver exceptional customer experiences over the phone and grow their companies.



About the B2SMB Institute

The **B2SMB Institute** is the first professional organization focused on advancing excellence in the business-to-small-business ecosystem.

B2SMB leaders, practitioners, brands and enterprises rely on the Institute for critical market intelligence resources, peer-to-peer networking, best-practice guidance and specialized skills development.

The B2SMB Institute champions small-business-centric thinking and practice, with a focus on how to reach, engage, win, keep and grow SMB customers.

Our member-driven organization serves as a dynamic, daily destination to find, meet and network with B2SMB decision-makers who share common needs, challenges and goals.

Visit <https://b2smbi.com/> for details on resources, benefits and membership opportunities.



Playbooks19 Online

March 19-20, 2019
Web Event

Playbooks19 Online is a two-day web event produced by the B2SMB Institute, featuring **peer-to-peer workshops on how to successfully win, keep and grow small-business customers.**

The Virtual program will feature leaders in B2SMB marketing, sales, product development, customer service, delivery and more, offering B2SMB practitioners a crash course in doing their jobs better.

Grab an All-Access Virtual Pass

FREE to B2SMB Institute Members
\$99 for Non-Members

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