

ScaledOn Playbook: The Customer Loyalty Flywheel



How to Turn Happy Customers Into Your Best Sales Channel

Step 1. Exceptional Service → The Foundation

The difference between “meh” service and referable service is usually in these **unsexy systems**. Do them right, and customers brag about you without needing to be asked.

✦ **Best practice:** Customers don’t refer mediocre experiences. Make fulfillment, support, and communication seamless.

How to accomplish this:



1. **Audit the customer journey** - map every touchpoint (from first ad click to unboxing or onboarding). Identify where friction happens (slow response times, unclear shipping updates, lack of reporting).



2. **Set service SLAs** - decide what “seamless” means in numbers.

Example: respond to support tickets in under 2 hours, resolve within 24. For ecommerce, track on-time delivery rate and return handling time.



3. **Automate the boring, humanize the critical** -

- Use **AI chatbots for FAQs** (shipping status, invoice copies).
- Reserve human support for escalations and moments that build trust.



4. **Close the loop** - after every resolved issue, send a quick “How did we do?” survey.




5. **Communicate before they ask** -

- **For ecommerce:** proactive shipping updates, back-in-stock alerts, delay notifications.
- **For services:** monthly or milestone reporting, even if “nothing major happened”. Silence kills trust.

Step 2. Happy Clients → Capture Sentiment Early

We've seen too many businesses treat surveys as "checkbox exercises." The winners actually use feedback loops to drive product decisions, service improvements, and referral timing.

 **Best practice:** Don't wait until customers leave to find out how they feel.

How to accomplish this:



6. Make feedback a habit, not an event

- Build surveys and check-ins into your lifecycle flows, not as one-off "please review us" emails.
- **Example:** an automated 30-day post-purchase NPS survey for ecommerce, or a milestone survey after campaign launch for services.



7. Ask at the right emotional moment

- Timing is everything:
 - i. **Ecommerce** → right after unboxing or first use (customer's excitement is highest).
 - ii. **Services** → right after a win (ROAS milestone, new campaign launch, first lead flow).
- Avoid asking during **"neutral"** phases when excitement is low.



8. Use the right format

- Keep it dead simple (1-2 clicks max).
- **NPS (Net Promoter Score)** for "Would you recommend us?"
- Add one open-ended follow-up: "What's one thing we could do better?" → pure gold for improving operations.



9. Automate the triggers

- **Tools:** Delighted, Typeform NPS, SurveyMonkey for lightweight flows; Klaviyo or HubSpot for automated triggers tied to CRM data.
- **Example:** "30 days after order shipped → send NPS email + SMS reminder if unopened after 2 days."