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360-Degree Customer View

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360-Degree Customer View

The customer contact community may talk about the importance of human connections, but the overwhelming majority of customers still feel like strangers.

During their interactions with brands, fewer than 21% of customers believe agents truly know about them or their issues. Fewer than 26% believe agents have enough context to solve the problem at the beginning of the interaction. "Unwanted upsells" are among the most widespread customer complaints.

The alarming statistics should not come as a surprise. Brands, after all, openly acknowledge that they lack meaningful insight into their customers. More than 80% say agents have to access multiple systems when interacting with customers. The majority do not provide agents with relevant context when customers escalate from other channels.

A lack of a 360-degree customer view, moreover, ranks as one of the top customer contact pain points. Brands call it *the biggest inhibitor* to a great digital experience, ranking its impact above factors like budget and resource limitations.

Attaining that 360-degree view is the key to developing more meaningful insight into today's customers. It, to put it simply, is what "knowing one's customers" is all about. When a brand and its agents can instantly access insights about a customer's profile, purchases, behavior and sentiment — across all touch points and lines of business — they can consistently deliver a highly personal, yet immensely efficient experience. They can truly make customer centricity a reality.

This special report will empower you to develop, perfect and leverage a 360-degree view of your customers. It will reveal what a 360-degree view entails, what it takes to require this true view of your customers, and how you can leverage the view to improve the customer experience, employee experience and overall operation.

The Most Valuable Customer "View"

By identifying a 360-degree view as the top inhibitor to successful digital engagement and a clear operational bottleneck, today's contact centers understand its importance. Many, consequently, are enthusiastically pursuing a more robust view of their customers.

The problem is that many are still unclear on the definition of a 360-degree view. Some take an unfortunately reductive approach, thinking it is merely about having a record of a customer's interactions in all channels. Such a view may be an improvement from the status quo in many organizations, but it is not sufficient to truly connect with customers. It is far too fragmented to provide a true portrait of the omnichannel customer journey. It is also far too transactional to facilitate a more human experience.

On the other hand, some may go too far in their quest to acquire the most useful customer data. Providing agents with an abundance of superfluous information is no more helpful than providing them with insufficient information. If anything, it is worse; at least agents with limited views know their limits and know when they need to ask questions.

The success of the customer experience, therefore, hinges on determining the *right* kind of 360-degree view. **There are three essential lenses.**

1. The Interaction Journey

Customers, above all else, want to achieve their goal or complete their purchase as quickly or easily as possible. To meet that demand, it is imperative to have a relevant portrait of the specific interaction journey.

This view includes insight into the customer's intent for the purchase or service interaction. By arming agents or self-service platforms with a clear sense of why the customer is interacting, the intelligence will ensure the conversation moves in the right direction.

A sufficient snapshot of the interaction journey also includes a real-time record of all communication a customer has made — across all channels — in pursuit of the particular intent. Needing to repeat information ranks as one of the biggest customer pain points; by knowing what a customer has already provided in pursuit of a resolution, the agent can greatly limit (if not completely eliminate) the need for repetition.

> "Customers want a choice on how they will interact with a contact center and when they have utilized multiple channels to resolve an issue; their expectation is that your agents will know what transpired in each of their interactions," explains Ricardo Layun of Radial. "They do not want to have to restate their situation each time they chat, call, chat or reach out via SMS."

> "The handoffs ... that's what kills [the customer experience], when it goes from one point to another, and [context] gets dropped," adds Jim Tincher in the latest CCW Digital Podcast.

The journey is not, however, strictly about communication at certain touch points. It also involves the experience of locating and moving *between* different contact channels. This "in between experience" greatly impacts the customer journey; knowledge of that experience is instrumental in forging the strongest possible connection with customers.

A final element of the journey view involves relevant insight about the customer's sentiment throughout the journey. Leveraging sentiment analytics technology and manual agent reporting, the organization will not simply be able to pinpoint how the customer feels at any given moment of the process but predict how the customer *will* feel if certain actions are taken. This insight consequently contributes to a great customer experience.

2. The Customer's Relationship Profile

Resolving the issue is obviously a fundamental tenet of the customer experience, but it takes more than a transactional resolution to demonstrate customer centricity. A truly great, customer-centric experience involves developing an ever-growing *relationship* with the customer.

A valuable view into the customer experience, therefore, includes a glimpse of the entire lifecycle of interactions between the brand and customer.

This portrait includes a view into *critical* interactions and purchases. Agents may not always require a record of every minor piece of communication, but they absolutely will need insight into those that have positively or negatively impacted the customer's perception of the brand.

> "Customers expect retailers and businesses to 'know' them and value them as a customer," declares Layun. "Customers sign up for loyalty programs, share their input via social channels, reply to surveys, engage with your brand and in return expect a certain level of awareness of who they are. In a recent study by Radial and CFI Group, 80% of customers expect retailers to have direct access to order/ account history for orders they place for direct shipment to their homes. In addition, 71% expect agents to have access to the prior interactions the customer has had with the retailer."

To truly understand the relationship, the organization will also want a long-term "sentiment score" as well as a record of noteworthy customer feedback. When an organization understands the customer's overall perception of the brand, it can identify which customers are either at risk of leaving or particularly likely to increase their purchasing and advocacy.

Although it would be ideal for customers to leave feedback after every moment of truth, the reality is that many communicate their feelings with their wallets rather than words. A robust 360-degree view, therefore, involves an analysis of the customer's buying habits. In addition to offering a valuable window into the customer's satisfaction level, such data will also help the organization successfully adapt to changes in the customer's behavior and preferences.

When it comes to understanding preferences, few forms of data are more relevant than the customer's engagement habits. An organization that can understand where the customer wants to communicate, how the customer feels about self-service and what kind of conversation the customer seeks can consistently deliver a personal, uniquely valuable experience.

"[Analyze the difference between] the customers that are really having a great experience, staying with you, buying more from you - and maybe even there are problems but they're able to overcome them ... versus those times when the customers say 'I've had enough,'" advises Tincher. "What differentiates those? Those are the moments of truth - the must-win cases."

3. The Customer's Lifestyle Profile

Few organizations consume more than a tiny fraction of a given customer's time, thought and energy. As a result, insight into the customer's existing relationship with the brand does not tell a complete story.

To truly understand opportunities to expand relationships with customers, organizations will evaluate their broader demographic and lifestyle profiles.

Leveraging a combination of market research, reactions to sales and marketing campaigns and social media monitoring, they will determine how they fit into each customer's existing value hierarchy — and what they can do to command a larger wallet share.

Visibility into a non-customer's history within the industry — such as negative reviews on Yelp or Twitter — will arm the organization with more insight into how to attract and retain that buyer.

Hiring *from* the target demographic strengthens an organization's view of prospective customers. When it has employees who can literally speak on behalf of the marketplace, it can make the right decisions about product lines, sales cycles and support experiences.

"We are the largest equine retailer; we carry everything that you need as a rider, as a horseowner, as a trainer, etc," notes Lizzie Resnick of Smartpak. "One of the things that makes us unique from a customer care team perspective is that we hire all [people with an equine background, such as riders]."

Collectively, these forms of data help achieve an important objective: creating the best possible first impression.

Obstructed View: Why Don't Companies Know Their Customers?

Meeting *every* criterion of the 360-degree view may be challenging, particularly for organizations in impersonal, transactional industries.

The typical organization is not, however, only falling short on one or two tenets. It is struggling to develop anything approximating a robust view of its customers. It is missing intelligence that is absolutely fundamental to knowing one's customers and expanding one's customer relationships.

There are several key causes for this struggle.

No Sense Of "Purpose" For The Journey

Rather than proactively thinking about an overall objective for the customer journey, far too many brands react to specific inquiries and issues. They neither consider what led to the problem nor what the next step in the customer's journey may be. Their only priority is solving the problem at hand.

Without considering the big picture goal for the customer journey, these organizations cannot zero-in on the right customer data. They, more importantly, cannot determine which data is most "actionable" for a particular customer scenario.

> **Recommended Action:** Do not settle for journey mapping; commit to journey orchestration. Upon making that commitment, begin to analyze the various customer intents — and determine what information will help meet each objective.

Insufficient Appreciation For Personalization

Many organizations confuse "politeness" for personalization. They assume that advising agents to deliver a friendly, warm greeting is the same as truly tailoring the experience to each customer.

As a result, they do not sufficiently appreciate the importance of developing single customer records. They simply treat each individual as a one-off, "guest" purchaser.

Without a mechanism for building accounts and profiles for each customer, the organization will have no chance of collecting or leveraging the intelligence needed to turn a "transaction" into a "relationship."

"A 360-degree view is not only about having a picture of every interaction across every channel," notes Layun. "It is about learning from a customer's experience across each channel and use these learnings to then create a more seamless and personalized customer experience."

Recommended Action: Determine what an "account" looks like in your organization; build that vision into your CRM solution and then ensure all agents, bots and monitoring tools can read and write to those profiles.

Disconnected Channels And Systems

In today's omnichannel world, even the most simple and straightforward interactions span multiple channels, systems and departments. Insofar as few organizations are successfully integrating these touch points, they are unable to develop, let alone leverage, a 360-degree view of their customer experiences.

> "Brands need to understand their customers and the customer experience journey that they want to deliver based on what is meaningful in their value proposition," advises Layun. "Once they have made that determination, they need to be able to present contextual information to the agents in a real-time, meaningful manner. A core challenge is that the information or data often resides in multiple legacy system along with new and emerging technology that is not easily integrated into a customer profile or agent-usable view."

Misalignment between functions exacerbates the challenge. If the sales, marketing and customer service teams do not share objectives, information or overall visions, they will heighten the feeling of fragmentation and further hinder the construction of a 360-degree view.

The situation becomes even more problematic if the organization does not properly collaborate with its third-party vendors and partners.

> **Recommended Action:** Align all departments and stakeholders around key customer experience goals; wholly integrate all contact channels and enterprise systems.

Insufficient Voice Of The Customer Program

It takes a robust combination of external research, voice of the customer surveys and real-time analytics to understand customers, and few organizations are meeting this high standard.

Some do not have a mechanism for collecting this data on a consistent basis. Even if they do, they are not necessarily collecting the data in a unified, aligned manner that would uncover key trends and opportunities.

"We try to get feedback from customers; quality assurance is great, but it's also from the perspective of a manager or supervisor versus the actual customer," explains Resnick. "Getting live feedback from customers is really beneficial as well, and we look at all that feedback."

Recommended Action: Leverage omnichannel analytics tools, user-friendly surveys, social media monitoring and market intelligence to uncover the voice of the customer; Utilize AI and human analysts to extract the most relevant insights from the data; Unify customer experience and operational insights.

Information Isn't Actionable

When an organization can successfully gather and align data from various sources, it can start to make intelligent decisions about how to personalize interactions and elevate journeys. This prescriptive intelligence is futile, however, if the organization does not ensure it is in the hands of the right stakeholder at the right time.

Few organizations are demonstrating this truly "actionable" approach to intelligence. They are not empowering agents to make customer-centric decisions during tough conversations. They are not providing bots with custom insights for individual customers. They are not advising the product development team on how to avoid common pitfalls and issues.

Recommended Action: Simplify agent desktops to provide a quicker view of customer information and product knowledge; Use AI-driven agent augmentation tools, including next best action recommendation; Coach agents to use data more strategically in conversations.

Deriving Value From The 360-Degree View

Although the idea of "knowing" customers is an inherently nice gesture, it is only important if it can foster real results. It needs to yield greater sales, more marketing conversions and a more frictionless, personalized, predictive and proactive service experience.

The data, alone, will not necessarily guarantee these outcomes. There are, however, several best practices that will yield results.

Define "Great" Experience(s)

In order to acquire and present the most useful customer data, the organization needs to firmly establish its objectives. What is it trying to achieve when interacting with customers, and which specific insights will facilitate that outcome?

> "We really key-in on [advocacy score]," shares Alex Gross of BARK. "We have a monthly sampling of that, and we want to make sure it's improving every month. Any changes with an expected improvement to the [score] need to be measured after the change is implemented."

Map Journeys; Fix Gaps

All customer-brand experiences, no matter how simple or complex, involve a journey. Customer-centric brands will deeply analyze this journey to not only anticipate customer behavior but identify gaps in internal systems and information sharing. They will also uncover opportunities to collect and leverage more customer data.

Become a Legitimate Omnichannel Enterprise

Organizations generally know that omnichannel is more than multichannel, but they don't necessarily appreciate how much bigger it is. It's not just about connecting customer contact channels; it's about unifying all internal enterprise systems. It is also about unifying the entire end-to-end experience. Everything — from marketing, to sales, to service, to delivery and fulfillment, to renewals — is a singular experience. Internal systems and processes have to accommodate that reality.

> "The most important factor to success is involving the broad community," declares Tincher. "We found that HR is not part of the effort 93% of the time, yet they're the ones building the culture. IT - 70% of the time they're not involved. It's really about involving them [in orchestrating the journey] to create the best solution."

Committing to Singular Customer Records

If an organization's goal is to treat customers as people rather than numbers, singular customer records represent an absolute necessity.

Whether via face-to-face recognition, retail accounts, cookies or other security tokens, the goal is to consistently recognize the customer at all times.

Use AI to Augment Agent Communication

The 360-degree view becomes useful when agents leverage the data to better connect with customers. Leading organizations are using AI-driven tools to surface the right insights at the right moment; agents say what they should say in each scenario.

"The first thing that was important was getting the resources from the technology side to support our customer experience team," says Gross. "A lot of the insight that we find can actually lead to a really exceptional customer experience is if we can tweak one thing from the agent experience; if you don't have the tools to make those changes, you're not going to succeed."

"By having the integrated automation and technology, it can provide the agent with a 360-degree view prior to the customer's interaction with the agent," adds Layun. "This will help avoid redundancy and customer effort."

"Use the data to understand what elements of a customer experience — their tenure with you, how many times they contacted, the number of add-ons they've purchased - are going to be the real drivers to an agent knowing how to handle that customer," notes Gross. "Find those drivers and then create a great interface."

Train Agents for a 360-Degree World

Agents are used to an environment in which they have to tirelessly re-ask basic questions and frantically search for basic information. By streamlining their interfaces and arming them with actionable data, organizations eliminate these bottlenecks. The key, at that point, is to train them to make the most meaningful connections possible with that information.

"Training specifically around building rapport, what questions to ask, how to read the customer - that's very important and it's something that we build as part of the onboarding training ... as well as the ongoing training and constant coaching that we do," reveals Resnick.

Predict and Pre-empt

In a service context, predictive engagement involves knowing why the customer might be calling, if not communicating resolutions before the customer even calls. In a sales and marketing context, it may mean dynamically altering messages, storefronts or websites to speak to what the particular customer likely wants to buy in the moment.

About the Author
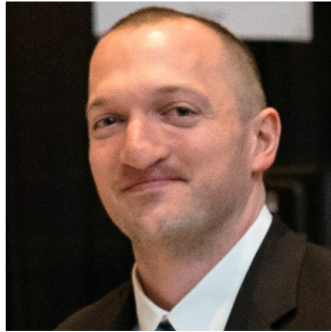
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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives for CCW Digital's series of reports. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

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Upcoming Events

JULY

Digital Product by Design
July 29-31, 2019
Los Angeles, CA
https://digitalproductbydesign.iqpc.com

AUGUST

CCW Executive Exchange
August 18-20, 2019
Radisson Blu Aqua Hotel, Chicago, IL
www.ccwexecutiveexchange.iqpc.com

SEPTEMBER

CCW Digital Online Event—Trends in Customer Experience Design & Strategy
September 10-11, 2019
https://www.customercontactweekdigital.com/online-events/trends-in-customer-experience-design-strategy

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CCW AUSTIN
September 16-19, 2019
Hilton Austin, Austin, TX
www.customercontactweekfall.com

SEPTEMBER

CX Week Canada
September 23-25, 2019
Chelsea Toronto, ON
www.customercontactweekdigital.com/events-cxweekcanada

OCTOBER

Service Design
October 15-17, 2019
Chicago, IL
https://servicedesignweek.iqpc.com/

2019 Special Reports Calendar

Special Reports Calendar is subject to change.
Updated as of 4/15/2019

Publish Date	Report Topic	Sponsorship Deadline
Sep. 3	Open Work Spaces for the Contact Center	Jul. 26, 2019
Sep. 16	Contact Center Security & Fraud Prevention	Aug. 12, 2019
Oct. 1	Actionable Analytics	Aug. 26, 2019
Oct. 15	Digital CX	Sep. 18, 2019
Nov. 1	Workforce Optimization	Sep. 30, 2019
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