SPECIAL REPORT:

FP3 EXPERIENCE

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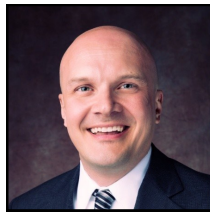
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NO COMPROMISING ON THE CUSTOMER EXPERIENCE

Everyone loves easy pathways to victory. Everyone hopes to identify bulletproof "get rich quick" schemes.

None, unfortunately, exist within the realm of customer contact. There are no shortcuts to customer satisfaction and loyalty.

If you want to cultivate meaningful, lasting loyalty, you must deliver a *complete* experience. You must deliver a journey that is frictionless, personalized, predictive and proactive.

Make no mistake: one or two of those priorities may be more relevant in a given situation. All, however, will be relevant at *some point* in time. As a result, you cannot afford to ignore any.

A frictionless, personalized, predictive and proactive experience—an FP3 experience—is not thought leader or vendor construct. It is not a catchy way to drive blog traffic, sell technology or book consulting engagements.

It is accurate articulation of what customers truly demand. Customers identify fast, first contact resolutions as their top priority when engaging with businesses. They love friendly agents who make a personal connection and hate repeating information about their identities or issues. They gravitate toward brands from which they receive targeted messages and alerts.

Indeed, they are demanding experiences that are low in friction, high in personalization and reliant on predictive insights and proactive outreach. They are legitimately demanding an FP3 experience.

Therefore, retailers and brands have no choice but to deliver. Meeting that demand may not guarantee you unprecedented wealth, but failing to make good on all four tenets *will* jeopardize your ability to compete.

This report walks through strategies for building the optimal customer experience. It begins by exploring the intersection between the four tenets, before providing tips for overcoming specific challenges and threats.

NO COMPROMISES: A BLESSING IN DISGUISE

Each of the FP3 components represents an intimidating, demanding endeavor in its own right. Naturally, the idea of delivering *all four at one time* seems like an aggressively daunting task.

In reality, organizations should embrace the inability to compromise as a blessing. Collectively focusing on all four FP3 elements is actually the easiest way to elevate the customer experience.

Reducing friction, increasing personalization, predicting behavior and proactively engaging are not disparate or contrasting goals. They are complementary endeavors that each boost and benefit from the other.

Frictionless

When systems and processes are frictionless, the organization can capture and communicate valuable information about customers and their issues.

Since all agents and systems will have instant access to rich, specific data about each customer, the organization will be able to more successfully personalize the experience.

Not simply helpful for executing individual transactions, that insight will help the organization better understand how and why customers engage throughout the journey. Using that information, the organization can predict behavior and further tailor experiences.

> By knowing the customer, the history, the past interactions, customer perceptions of service etc., an agent is fully informed and can use the information to problem solve, thus getting to the root cause in order to take the necessary actions. With a unified view of the customer, agents are able to quickly assist and prevent the customer from having to rehash their history every time they contact the business.
>
> *- Ricardo Layun, Radial*

With knowledge about what customers really want, where they choose to connect and what bottlenecks they face when they do, the organization can also ensure its proactive engagement is useful and resonant.

Personalization

If an organization focuses on understanding each customer, it can remove the frustration associated with their specific journeys. It can also predict their likely reasons for interacting, leading to more productive, engaging support at every touch point.

Personal preferences also play an instrumental role in shaping a proactive engagement strategy. They let the business know what information and calls to action it should be communicating—and when and where it should be delivering those messages.

Predictive

By predicting why the customer is calling, the organization can avoid the basic, qualifying questions that tend to cause delays, frustration and friction.

The organization can, moreover, use the intelligence to deliver more personalized, specific messaging upon communicating with customers. It is far easier for agents to personalize calls when they know why customers are calling.

> Being able to predict enables a proactive experience, which ultimately takes care of the customer before they even know they need the support.
>
> *- Ricardo Layun, Radial*

Proactive

When leveraged correctly, proactive engagement frees the customer of the need to call—and thus reduces effort.

The messaging contains a contextually relevant outcome and demonstrates the extent to which the business values its customers. Both communicate personalization.

By assessing the impact of proactive outreach on inbound contact volume, the organization can also predict why customers are calling—and what type of support they warrant.

FP3 EXPERIENCE: OVERCOMING THE CHALLENGES

There is an opportunistic, customer-centric justification for the FP3 experience: by providing customers with what they are demanding, the organization will forge more permanent and lucrative relationships. The customers will continue spending with the organization and very likely increase purchasing over time.

There is also a cost-driven justification: bad experiences cost money. The inefficiencies that lead to slow, impersonal experiences on the front end almost always reflect poor, unproductive processes on the back end. They also lengthen calls—customers need more time to resolve their issues—which compounds the inefficiency of the operation and frustration of its customers. In the best-case scenario, these disgruntled customers may take their own business elsewhere. In the worst case, they broadcast their frustration to friends and social media followers. Either way, the business takes a hit.

While the former motivation may seem more upbeat and noble, both lead organizations to the same conclusion: they must wholeheartedly commit themselves to the FP3 experience.

The bad news: in pursuing experiences that are frictionless, personalized, predictive and proactive, organizations will face a myriad of challenges.

The good news: when an organization makes use of specific best practices, strategies, tools and technologies, those challenges are easy to surmount.

Friction

Reducing effort is the #1 customer experience priority for 2018. It also directly speaks to some of the biggest issues for customers, including needing to repeat information, endure delays or call back for more assistance.

Friction, sadly, has become a fixture of the contact center. The customer experience process—for customers, systems, agents, leaders, and the business at large—is a constant source of frustration and limitation. Even if these entities can get what they want, it may not come exactly when they want it.

Disintegration

When systems are not connected, customers and their data cannot move seamlessly between channels. Agents, moreover, cannot properly support these customers.

All parties must devote more effort to the experience. All parties, accordingly, will develop more frustration with the experience—and dissatisfaction with the brand.

To deliver an FP3 experience, organizations must eliminate these fragments in their systems and processes. They must unify their channels, systems and desktops, either by implementing compatible technology or switching to a singular customer contact platform.

Misalignment on objectives

Unified systems give organizations and their agents the theoretical power to quickly, easily and successfully support customers.

That power is for naught, however, if organizational stakeholders are unclear about what that support actually entails.

If different employees — whether separated by seniority, department, function or physical location — have different perspectives regarding key customer experience objectives, they will be unable to make swift decisions when interacting with customers. They may struggle to determine the right conversational tone or message. They may stress or repeatedly consult supervisors about the most appropriate resolution.

They, ultimately, may turn the simple art of satisfying customers into a complicated, frustrating and difficult endeavor.

To successfully deliver an FP3 experience, organizations must eliminate that philosophical form of effort. They must set core customer experience objectives that apply to most situations in most touch points. They must also provide agents with education on core operating principles and values (and consult agents when setting those objectives). With that information, agents can quickly make customer-centric and business-centric decisions in unique and unpredictable situations.

All parties, moreover, will feel *invested* in the experience and the goal of making customers as happy as possible.

> "Empower agents to take the necessary actions to resolve the issue and minimize the need to transfer the customer around to 'other' departments. Educate agents on the full order process and provide the necessary connection points to subject matter experts, resources and information to facilitate empowerment and resolution.
>
> *- Ricardo Layun, Radial*

> "There are things you can get from an agent that would take an eternity to get from a feedback score, We listen to them on 'hey, what would make that better' ... things that come up that we address quickly. [This also] drives a great deal of credibility from your team. They believe in you ... and they do feel comfortable in bringing these things to you. We're able to [improve] pretty quickly [in that environment].
>
> *- Shawn Castle, Valvoline*

> "We've brought in a few people to help us with change management. We now have a few agents directly involved through the purchasing cycle, through the deployment cycle, through the value realization afterward—we want the agent involved from the moment we decide to jump into a new space.
>
> *- Terry Lang, Comerica Bank*

Poor partner management

Nearly all customer contact functions rely on outside labor. Some outsource a portion, if not all, of their live customer support staff. Others leverage third-party support for back-office processes, while many businesses contract with external providers to manage technologies.

These partnerships introduce new layers of complexity into the operation, which could manifest as effort for employees and customers.

"Could" is the operative word. If organizations instead view these external organizations as *partners*, they can mitigate the integration challenges. They can establish unity when it comes to culture, metrics, training and systems. This degree of collaboration minimizes the fragments and effort associated with the experience.

It allows organizations to reap the efficiency benefits of outsourcing without sacrificing quality.

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> Our agents are trained as ambassadors of the companies they represent. We go the extra mile to ensure our training programs, processes and service levels are on par with our customers' desires. We also utilize Lean Six Sigma and Continuous Improvement to eliminate any areas of friction.
>
> *- Ricardo Layun, Radial*
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Insufficient journey mapping

To truly understand sources of customer effort, an organization must walk a mile in its customers' shoes. It must understand what they encounter over the course of their relationship with the business. Where do they connect? What are they hoping to achieve? And what happens as they pursue those outcomes?

Indeed, journey mapping and analysis are essential for reducing customer effort. They are the keys to identifying and remedying all potential sources of pain.

Unfortunately, few organizations approach journey mapping correctly. Some do not use it at all. Others do but make the mistake of viewing different parts of the journey in isolation. By focusing only on the journey within one channel or within one engagement function, these organizations are unable to identify the effort associated with moving *between* those touch points.

To truly harness the power of journey mapping and meaningfully reduce effort, organizations must pair a unified, big picture journey map with robust, intent-driven customer analytics and voice of the customer insights.

Third-party partners who either handle aspects of the journey or simply have overarching knowledge about how customers wish to engage should play an instrumental role in building and interpreting these maps.

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When we find those pain points, we consider how to mitigate them both in a short-term strategy and then also in a long-term strategy. We work with our technology teams, our own system administrators, and even our frontline agents to go 'what are the obstacles we need to remove, what's a short-term stop-gap solution, and then how do we look for technology, solutions or process changes that eliminate them so that, ultimately, the customer doesn't feel that pain.'

- Shawn Castle, Valvoline

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"We have just moved away from a traditional DTMF IVR and have stood up our first instance of a natural speech IVR, It's been transformative. In the last twelve months, we've been able to double the number of self-service opportunities for customers. When an issue comes to the agent, the agent knows it's a problem only they can solve.

- Terry Lang, Comerica Bank

Personalization

In a recent CCW Digital survey, executives identified "personalization" as the defining sign of a customer-centric brand (commitment to reducing effort was #2). Nearly 80% revealed they are actively working to personalize their experiences.

Wanting to personalize and actually personalizing are, unfortunately, two very different concepts. In order to go beyond lip-service (such as stating the customer's name) and meaningfully personalize experiences, organizations need to overcome key challenges.

Resistance to omnichannel

In 2018, some may dismiss "omnichannel" as a dated, overused term.

On the one hand, the reaction makes sense. There is no customer contact term that better exemplifies the idea of a cliché.

On the other hand, the reaction is unacceptable. Leaders may be vividly familiar with the term, but they are not necessarily driving omnichannel experiences within their organizations.

Organizations may support customers in multiple channels, but they do not create a seamless, consistent, unified experience *across* these channels. Customers may not be able to move between them, and their data definitely cannot. Fifty-two percent say customers *always* need to repeat information when
changing channels.

That repetition reflects an undesirable degree of effort. It also confirms the organization's inability to personalize the experience. Without instant, guaranteed insight into who the customer is and where the customer has been, there is no way the organization can tailor the experience to customers.

Building a legitimate omnichannel framework is an essential stop on the road to personalization.

No emphasis on sentiment

Organizations claim to value the human aspect of the customer experience, but fewer than 50% are actually measuring sentiment.

Without insight into *how customers feel*, organizations cannot properly adapt their experiences. They can only offer generic processes and scripted language. They may be able to tell the customer what they objectively want to hear, but they cannot share the information how the customer wants to hear it.

To create an FP3 experience, organizations must build a robust mechanism for capturing and leveraging customer sentiment. They must first deploy feedback initiatives and analytics tools that can actually provide a window into customer sentiment. They must then build sentiment into their KPIs (to ensure agents think about how customers felt when receiving their resolutions) and training (to ensure agents know how to adapt in emotional situations).

## Poor coaching/training/metrics for personalization

A lack of emphasis on sentiment is one flaw common to modern contact centers.

It is not the only flaw.

From a big picture perspective, many organizations are simply unable to measure—or drive—personalization in their customer contact functions.

They do not have quantitative metrics for personalization. They do not incorporate personalization into their scorecards or quality checks. They do not coach agents on the art of personalization.

At best, many organizations focus on superficial signs of personalization, such as mentioning the customer's name at the start of the call. They use that element because it is repeatable, forgetting that repeatable is the very opposite of personalization. Superficial personalization efforts, moreover, do nothing to help reduce customer effort or predict behavior.
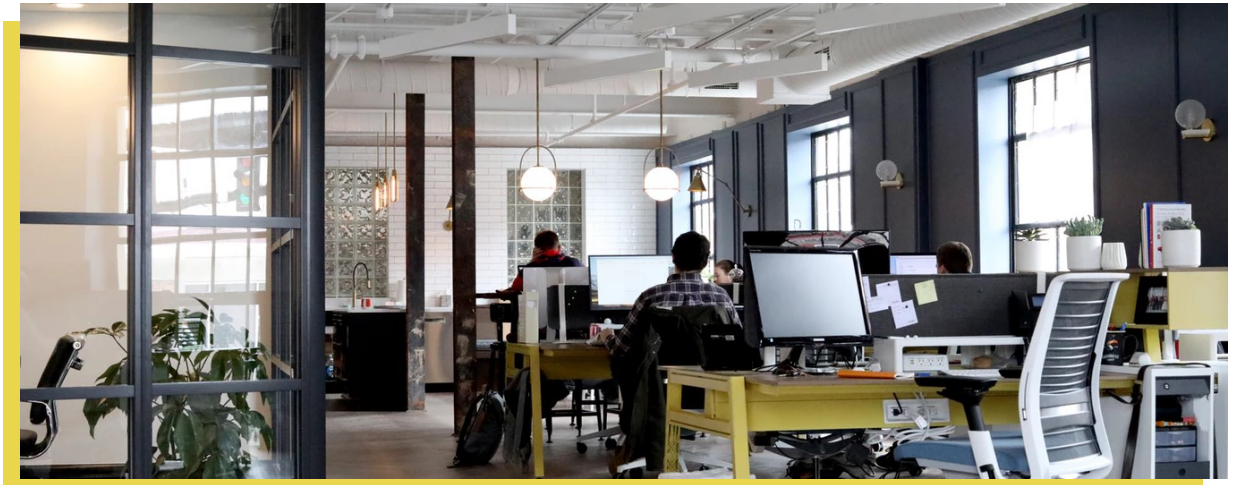
Organizations must stop falling victim to this trap. They must espouse a version of personalization that is, to put it simply, more personal. Rather than focusing on superficial "signs" of personalization, they should measure factors like unique customer sentiment or deviation from the script. They should also emphasize issue and personality-based routing, while training agents to adapt based on each customer's unique tone, personality and issue.

The goal should be to create an environment in which the agent communicates the required information in a manner that is as contextually relevant as possible.

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> I've called into certain companies, and I could tell the agents weren't even listening to me—they had to go through their written script, I call those human-bots. So one thing we won't ever do is have scripted calls. [Personalization] is really what separates companies that grow from those that lose the market edge.
>
> - Jim Thomsen, Sign-Zone
>
> "

No "storytelling"

When it comes to creating an FP3 experience, data is unquestionably king.

More accurately, *actionable* data is king.

Many organizations invest in tools to collect and support data but do nothing to ensure that data is useful to the key stakeholders. They, quite simply, forget the importance of *stories.*

On a macroscopic level, organizations (whether internally or through outsourcers) are not using what they have learned to optimize the experience design.

On a microscopic level, organizations do not provide agents with the specific, contextual information they need to personalize experiences. Typical "screen pops" may include basic information about the caller's identity, but they rarely give the agent the insight they need to make deep "connections" with customers.

To deliver that insight—and to help agents tell "stories"—organizations can make use of modern contact center technology. Once key systems are integrated, the organization can use automation tools to process and then report data in a more compelling and more actionable form.

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> Agents must quickly digest information about a customer, their specific issue and engagement history, then translate that into the best actions to address the customer and their individual situation.
>
> *- Ricardo Layun, Radial*
>
> "

Predictive

If there is one lesson to extract from the emphasis on journey-mapping, it is that the customer experience is a story. It may consist of individual interactions, but each interaction comes with specific context and importance, defined by where customers have been and where they plan to go.

Naturally, that places a burden on organizations delivering customer experiences. If they do not adapt experiences to that context, they come across as the transactional, impersonal brand that customers may not even tolerate (let alone endorse) in today's market.

It also creates an opportunity. Using context from previous interactions as well as an understanding of each customer's intent, organizations can predict future needs, sentiments and behaviors. They can adapt their journeys accordingly.

To seize the opportunity, organizations must overcome a set of challenges.

Insufficient emphasis on intent

Far too many organizations take interactions at face value. They focus on what the customer is requesting rather than why the customer is requesting it.

The *why* is the key to actually predicting customer behavior. It speaks to the customer's "intent"—his or her particular objective for initiating the engagement. Knowledge about that intent allows the organization to properly route the customer—and properly serve the customer—at the time of contact.

It also gives the organization a better sense of who the customer is, which helps with personalization and journey optimization down the road.

Acquiring this insight requires "deep listening" from both agents and analytics tools. Agents need to think about whether they are providing what the customer superficially requested or what the customer really wanted. Analytics and feedback tools can help enhance that portrait.

Overemphasis on outcomes

Organizations' dismissal of customer intent speaks to a broader problem: an overemphasis on the destination rather than the journey.

By focusing so heavily on "outcomes" (if they delivered what the customer said they wanted), organizations overlook the problems and pain points associated with those outcomes. The outcome-driven mindset dampens the impact of a "predictive" approach to engagement.

Consider someone who calls an airline to change a flight at the last-minute. An outcome-oriented organization would focus on the efficacy of the actual call: did the agent quickly and successfully process the new itinerary? A journey-driven organization, on the other hand, would consider how the customer *really* wanted to resolve the issue. Did they first seek a self-service option? If there is none, did they encounter difficulty finding the customer support number? Will they continue to encounter such difficulty in the future?

By thinking about the overarching experience, the organization can optimize the events before and after the call. Those events, after all, tend to represent the greatest sources of frustration—and thus the greatest differentiators between good and bad brands.

Poor change management

Predicting that a stock is going to triple means nothing if you do not actually invest the money.

Predicting customer behavior is meaningless if the organization does not actually adapt.

If the organization does not use its predictive insights to tailor the experience (whether by removing pain points or introducing opportune offers), it is merely chronicling a to-do list. It is not actually creating a better experience for the customer or driving results for the business.

Due to poor change management processes, many organizations find themselves in this camp. They can neither tailor experiences on the fly nor make sweeping changes to their operations, thus squandering the opportunity of their rich data.

To overcome this issue, organizations must make agility the centerpiece of their customer contact functions. They must leverage cloud technology and flexible partners to quickly and seamlessly adapt to workflow changes. They must also empower agents to deviate from the script when contextually relevant.

Sales, marketing and service silos

The customer experience refers to the totality of direct and indirect interactions between a customer and a business. It is not restricted to a specific channel. It, moreover, is not restricted to a specific function. Sales, support and marketing are all part of the same "journey."

Organizations that fail to embrace that reality fail to realize the true potential of predictive engagement. By fragmenting their different engagement functions, they limit their ability to understand the customer's intent and expectations. Worse, they limit their ability to take advantage of opportunities.

If a customer service interaction reveals a great future sales opportunity, the sales team needs to know—and be able to take immediate action.

Proactive

> " There is a plethora of data collected across the customer journey and customers are growing to expect a predictive and personal experience. The most frictionless interactions are proactive and preemptive.
>
> - *Ricardo Layun, Radial* "

A recent CCW Digital survey asked consumers to identify customer experience features for which they would consider paying extra. Proactive engagement was the most popular choice.

Proactive engagement is also the number one way to regain a customer's lost trust. By driving conversions without a lengthy sales cycle or thwarting potential issues before they become problems, it also drives efficiency.

When pursuing these benefits, however, many organizations forget that proactive engagement is not simply a fancy synonym for outbound communication.

Instead of looking for unique, relevant, resonant opportunities to create value for these customers, organizations impose unwanted spam on their customers. They squander the potential benefits of the outreach.

The FP3 experience hinges on an *effective* use of proactive engagement.

Determine the appropriate messaging

Some assume proactive outreach is *supposed* to be of a sales and marketing email and only focus on presenting offers. Others assume the very idea of proactive outreach is *customer-centric enough* and thus make little effort to further personalize their communication.

Both are missing the boat. The rules of personalization and context still apply; the messaging must be valuable to the specific customer at the specific time.

If not, it will be ignored at best and viewed as spam at worst.

Organizations must tailor their messaging. They must use intent-based journey-mapping to understand why customers typically purchase or engage, and which of those transactions can be appropriately handled through proactive communication.

> **"**
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> Proactive engagement must be relevant and timely to the customer. For example, if we know there are shipping delays due to weather, we can reach out to affected customers and reaffirm delivery dates before they contact us with questions regarding delivery status. We are creating a memorable, seamless experience and avoiding a potential negative interaction surrounded by customer friction and dissatisfaction.
>
> *- Ricardo Layun, Radial*
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> **"**

Identify channel preference

Assuming all customers appreciate proactive engagement as an inherent courtesy, organizations neglect to consider that the medium matters. A customer who hates calling for support will doubtfully appreciate a proactive phone call, even if the call is theoretically designed to add value or reduce effort.

By tracking behavior, monitoring conversion rates and leveraging voice of the customer surveys, organizations can ensure they are delivering their proactive messages in the right channels.

Prepare for the escalation

In theory, proactive engagement should reduce call volume.

In practice, it may *drive* customers to make inbound calls. Those who receive messages with special offers may have questions. Those who get an alert about their local cable service being down may want to call for an explanation or estimated restoration time.

If organizations do not prepare for this impact (whether because the inbound teams are unaware of the outbound messages or because they misjudge the reaction), inefficiencies will arise and customer effort will increase.

Indeed, organizations cannot treat proactive outreach as a simple, isolated endeavor. All proactive endeavors come with consequences (some positive, some negative) for the overall customer experience team.

Consider compliance

Many are leveraging proactive engagement in digital channels; popular applications involve doctors sending appointment reminders via text or banks alerting customers to payment due dates.

While organizations are right to consider these opportunities, they cannot afford to ignore potential compliance issues. Mobile channels are generally viewed as "insecure" from a customer data standpoint, and that greatly restricts what an organization can, let alone should, say in such media.

After incorporating customer intent, channel preference and messaging into its strategy, the organization must pay attention to data security and privacy issues.
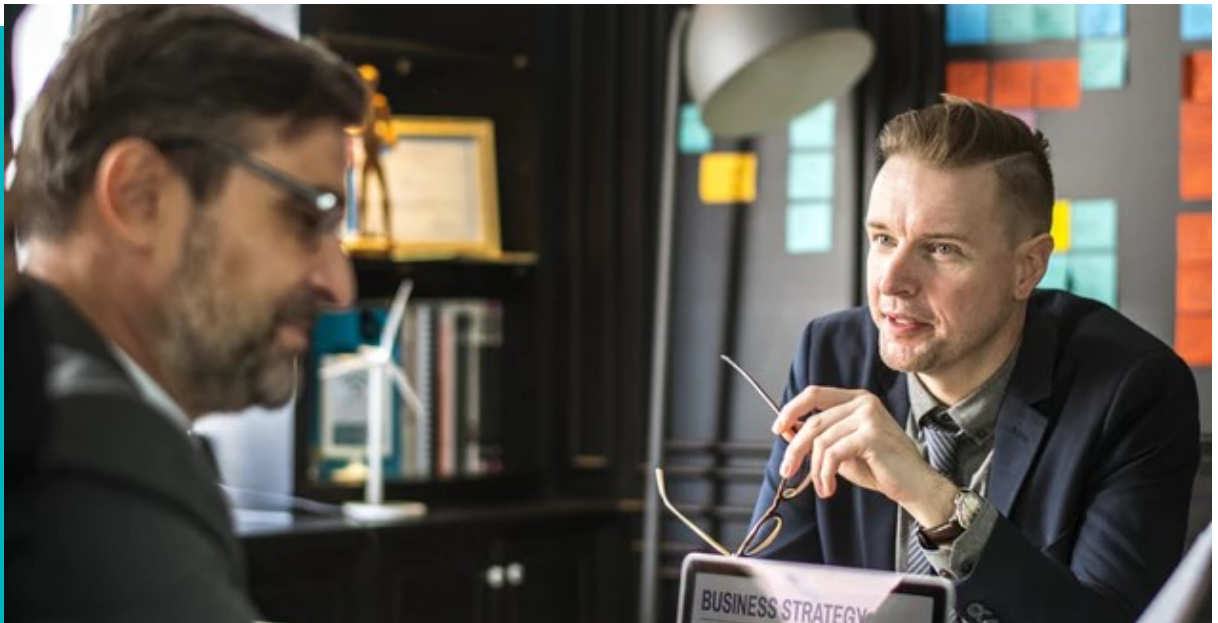
EMBRACE THE EFFORT, SO YOUR CUSTOMERS CAN ENJOY THE VALUE

The phrase "happy agents = happy customers" embodies an important reality for the customer contact realm.

What happens within the contact center directly impacts what happens on the frontline.

As organizations work to elevate their customer experiences, they must take that reality to heart. They must recognize that the first step in creating an FP3 experience for customers is to embrace those principles within the organization.

To ensure the experience is as easy as possible for customers, ensure the customer contact operation is as smooth as possible. Ensure all channels, systems, teams, departments, offices, and outside partners are technologically and philosophically aligned.

To create more personal connections with customers, ensure personalization is the mantra within the organization. Provide agents with the specific tools and coaching they need to adapt to unique situations. Recognize them as individuals, and they will value your customers as individuals.

To make your interactions more predictive, advocate for continuous progression. Show that you are constantly looking for ways to simplify and enhance the way agents fulfill their tasks. In addition to signaling the importance of anticipating needs, you will improve their ability and willingness to do the same for your customers.

To elevate proactive engagement, send the message that inbound calls are *a problem*. Let your agents know that the ultimate goal is to make those lengthy and frustrating "complaint calls" a thing of the past. Your agents are there to make customers happy, not simply less upset.

When you build a contact center atmosphere around the FP3 principle—and ensure your leaders, systems and partners share in that philosophy—you build a framework for delivering that experience for customers. FP3 becomes an inevitable reality.

And insofar as you are competing on the customer experience, FP3 becomes your ticket to a more successful business.

MEET THE AUTHOR
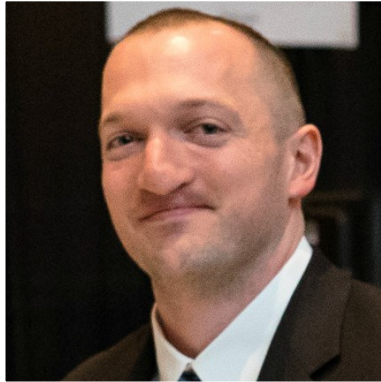
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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement 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.

Question by Arthur Shlain from the Noun Project; Question by Arthur Shlain from the Noun Project; Award by Dev Patel from the Noun Project

2018 Special Reports Calendar

Special Reports Calendar is subject to change.
Updated as of 7/2/18

Publish Date	Report Topic	Sponsorship Deadline	
Jan. 2	2018 Predictions	~~Dec. 15, 2017~~	SOLD
Jan. 16	Retail CX	~~Dec. 20, 2017~~	SOLD
Feb. 1	Omnichannel	~~Jan. 18, 2018~~	SOLD
Feb. 15	Messaging	~~Feb. 1, 2018~~	SOLD
Mar. 1	CX Automation	~~Feb. 15, 2018~~	SOLD
Mar. 15	Customer Intent	~~Mar. 1, 2018~~	SOLD
Apr. 2	Brand Reputation	~~Mar. 16, 2018~~	SOLD
Apr. 17	Outsourcing	~~Mar. 30, 2018~~	SOLD
May 1	Customer Contact Executives	~~Apr. 13, 2018~~	SOLD
May 15	Customer Journey Mapping	~~Apr. 27, 2018~~	SOLD
Jun. 1	Agent Performance	~~May 18, 2018~~	SOLD
Jun. 15	Self-Service	~~Jun. 1, 2018~~	SOLD
Jul. 1	FP3 Experience	~~Jun. 15, 2018~~	SOLD
Jul. 15	Learning & Development	~~Jul. 2, 2018~~	SOLD

2018 Special Reports Calendar

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Publish Date	Report Topic	Sponsorship Deadline
Aug. 1	Actionable Analytics	**Jul. 19, 2018**
Aug. 15	Contact Center Security & Fraud Prevention	**Aug. 1, 2018**
Sep. 4	The Digital CX	**Aug. 21, 2018**
Sep. 17	Chatbots	**Sep. 3, 2018**
Oct. 1	Outbound & Proactive Engagement	**Sep. 18, 2018**
Oct. 15	Remote Agents	**Oct. 2, 2018**
Nov. 1	Future Workspaces	**Oct. 18, 2018**
Nov. 15	Knowledge Management	**Nov. 2, 2018**
Dec. 3	Live Chat	**Nov. 16, 2018**
Dec. 17	CX Automation Pt. 2	**Dec. 3, 2018**

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