AUGUST 2020 MARKET STUDY

Customer Experience Trends, Challenges & Innovations

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CCW DIGITAL MARKET STUDY: CUSTOMER EXPERIENCE TRENDS, CHALLENGES & INNOVATIONS

By revealing that only 12% of consumers felt experiences were improving and only 11% felt brands even cared about getting better, CCW Digital’s 2019 CX Market Study unearthed a sobering reality. It revealed that for all their talk about customer centricity, brands were failing to live up to the promise of that concept. They were failing to listen to, let alone design experiences based on, customer demands.

As it suddenly transformed the landscape, COVID-19 threatened to exacerbate the issue. If companies could not focus on the customer during a period of relative stagnation, how could they achieve customer centricity when dealing with very real and sudden operational changes and challenges?

The cause for concern was legitimate. Inundated with decisions about how to migrate to a work-from-home environment or how to deflect calls to digital channels, it was very conceivable that brands would make operational decisions without wholly accounting for the voice of the customer. And, in fairness, some did make this mistake.

Ultimately, however, the initial reaction has been positive. Customers are reacting favorably to recent customer experience developments and are becoming more comfortable with the new, digitally driven normal.

That does not, however, mean everything went well. More importantly, it does not mean everything will be easy as customers make future changes to their demands and expectations.

By gathering data directly from consumers, this Market Study addresses those challenges. It assesses how companies are currently faring when it comes to the customer experience -- and what changes they will need to make to continue satisfying customers as the world enters its post-COVID era.

To put it simply, it reveals what customers actually want -- and how customers actually feel. It therefore represents the best foundation on which to develop a customer contact strategy.
METHODOLOGY & DEMOGRAPHICS

If the goal is to find out what consumers want, why not ask them directly?

To gather data for the Market Study on CX Trends, Challenges and Innovations, CCW Digital did exactly that. CCW Digital issued its 2020 Consumer Preferences Survey to a panel of everyday people in July 2020. Representing all age groups, income levels, and regions, the diverse panel of consumers answered a comprehensive list of questions about their expectations, preferences, behaviors, pain points, and demands when interacting with businesses.

The questions accounted for broader consumer sentiment, as well as specific reactions to the COVID-19 pandemic.

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. 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.
KEY FINDINGS

1. We were already in the era of customer centricity, and COVID-19 heightened the importance of the customer experience. In the wake of the pandemic, 59% of consumers say the experience plays a bigger role in impacting which brands they support.

2. Accordingly, the costs of a bad experience remain high. A staggering 66% of consumers will consider switching to a competitor after just one or two bad experiences.

3. Bad experiences also introduce additional costs, as 57% of consumers say they will complain directly to the agent or supervisor (increasing handle time), while 54% will complain to real-life or social media contacts (inhibiting customer acquisition efforts).

4. Although experiences have improved from 2019, issues like long wait times, multiple transfers, and unhelpful IVRs continue to frustrate many customers. Since customers still prefer efficient interactions to highly personal ones, these sources of effort and delay are particularly problematic.

5. As they increasingly deal with at-home agents, customers are mindful of the impact on call quality. Fifty-two percent (52%) would hold poor connection quality against a brand.

6. Other at-home concerns include unprepared agents, disengaged agents, and background noise during conversations.

7. COVID-19 has accelerated digital adoption; 82% of consumers now feel more comfortable using digital channels for at least some issues. The numbers are similarly encouraging for modern self-service options, such as chatbots.

8. As far as customers are concerned, ease-of-use, access to live agents, and mobile-friendliness are the most important signs of a great digital experience.

9. While obsessing over advanced chatbots and conversational digital channels, companies cannot ignore the good, old-fashioned website. More than half of consumers say their support journeys begin on search engines or the official site.

10. Brands that were transparent about service gaps and proactive in making changes scored the biggest points during COVID-19. Brands that optimize their e-commerce experiences will excel moving forward, as roughly half of customers plan to permanently scale down their brick-and-mortar shopping and scale-up their digital purchases.

11. An impressive 53% of consumers would be more satisfied with a brand that offers a callback option. Other satisfaction-boosting initiatives include providing text support, offering direct responses to feedback, and empowering agents with context about the customer’s identity and intent.
YES, THE CUSTOMER EXPERIENCE MATTERS

By adopting customer centricity as a strategic rallying cry, the business world has confirmed its belief in the importance of the customer experience. By reading a report entitled CX Trends, Challenges and Innovations, you surely possess the same ideology.

Is this emphasis on the customer experience worth it? Does elevating the engagement journey markedly impact relationships with customers, let alone the financial bottom line?

The answer, at least as far as customers are concerned, is a resounding yes.

For starters, bad experiences can be considerably costly. Adhering to a “three strikes and I’m out policy,” nearly 88% of consumers say they consider switching to a competitor after three or fewer bad experiences with a brand. A staggering 66% will only need one or two bad experiences to look for another provider.

In addition to taking their business elsewhere, these disgruntled customers will create additional costs through their complaints. Nearly 57% of consumers will directly complain to the agent - or the agent’s supervisor - following a bad experience. Addressing these complaints takes time, effort, and energy, thus representing a costly inefficiency for the business.

About 54% of consumers, meanwhile, say they will complain to their close “real-life” contacts and/or on social networks and review sites. These complaints could prompt other customers -- and a significant number of them if the comment goes viral -- from wanting to do business with the brand. In effect, one bad experience with one customer could damage relationships with many others.

So, yes, there is a clear risk to skimping on the customer experience in today’s environment.
But there is also a clear upside to delivering an exceptional experience, particularly in the wake of COVID-19.

Witnessing how different brands responded to the pandemic and its fallout made today’s consumers more conscientious about the experience. It made them more appreciative of brands that go the extra mile for customers and more dismissive of those that opt not to walk their customer-centric talk.

Nearly 59% of consumers, in fact, say they now place more importance on the customer experience when choosing the brands from which to buy. A brand that consistently proves its customer centricity, therefore, has an unparalleled opportunity to attract and retain customers. It has an unparalleled opportunity to grow its business.

So whether one wants to focus on the cost of a bad experience or the upside to a great one, the ultimate conclusion is the same: the customer experience matters.

After how many bad customer service experiences would you consider switching to a competitor?

![Survey Result Chart]

- 14.63% (1)
- 51.80% (2)
- 21.34% (3)
- 9.83% (4 or more)
- 2.40% - Customer service experience doesn’t matter / would never switch based on that

Suppose you had a bad customer experience. Would you complain in any of the following ways?

![Survey Result Chart]

- Directly to the customer service rep or their manager/supervisor: 56.83%
- Via a proper feedback survey: 55.16%
- Via an email/letter/comment after the conversation: 37.65%
- To my close friends/family/coworkers: 46.28%
- Via social networks (like Facebook and Twitter) or review sites (like Yelp): 27.34%
- No: 5.28%

Following COVID-19, do you care more or less about the customer experience when deciding which companies to support and buy from?

![Survey Result Chart]

- 58.51% - Care more
- 38.37% - No change
- 3.12% - Care less
MEET THE NEW PAIN, SAME AS THE OLD PAIN

Knowing something matters and making it count are two vastly different things.

The customer contact community understands this distinction all-too-well. CCW Digital’s 2019 Market Study confirmed the sobering reality that for all the hype around “customer centricity,” only 12% of consumers feel their brand experiences are meaningfully improving. Worse, only 11% believe companies sincerely care about getting better.

The simple reality is that it takes more than a declaration of customer centricity to reap the rewards and mitigate the risks of customer experience strategy. It takes demonstrable action.

Action, first and foremost, means delivering the experience today’s customers are demanding.

That endeavor is no easy task. Customer contact operations notoriously face a plethora of operational bottlenecks and challenges. Whether in the form of strategic misalignment, antiquated systems, bad data, or ill-prepared agents, companies face crippling challenges in their pursuit of a great experience.

Before addressing these challenges, however, many organizations will have to tackle a more fundamental issue: understanding what customers actually want.

In today’s marketplace, there is certainly some truth to the idea that customers want it all. Cognizant of the power they hold in the age of social media, these customers more notably know they can demand it all. Companies, in turn, have no choice but to consider every facet of the customer experience.

To put it simply, they have to strive for an FP3 journey - one that is frictionless, personalized, predictive, and proactive. They also have to demonstrate a supportive sense of humanity at every moment of truth.

Customers nonetheless do have a hierarchy for their demands, which means companies can set priorities for their transformations. Rather than trying to “boil the ocean,” they can take an incremental approach to their improvement.

Based on the voice of today’s consumers, that incremental approach should begin with delivering interactions that are accurate and fast. Asked to identify the most important aspect of the customer experience, 75% selected either accurate or efficient interactions. A non-trivial 18% supremely value empathetic interactions, but only 7% prioritize personalization or omnichannel capabilities.

In theory, this data should be good news for the customer contact community. The customer contact function has historically worn the “cost center” badge, rooting its operation more in tight, efficient processes than dazzling, intimately personal conversations. Providing fast, accurate support should be right within the typical contact center’s wheelhouse.

In practice, the typical contact center is notorious for its inefficiencies. These inefficiencies allow all-too-familiar “pain points” to linger for customers, creating an ongoing sense of disillusionment. Speed and accuracy may seem like easier goals for customer experience teams, but they have unfortunately not proven easy enough.
A staggering 56% of consumers, for instance, say that they often experience long wait times when trying to reach a brand. The number is more favorable than it was last year, but it is still a major problem given the notion that speed matters greatly to today’s consumers.

Other frequent pain points include multiple transfers (40%), unhelpful IVRs (37%), slow and unproductive agents (36%), difficulty reaching a live agent (33%), and having to repeat information (32%).

In general, these pain points are textbook efficiency issues. Given that contacting a brand already represents an unnecessary burden, customers will surely object to repeating information as they endure multiple transfers or unproductive agents. Given that IVRs are supposed to boost inefficiency, their tendency to frustrate customers is a noteworthy concern.

And though “difficulty reaching a live agent” may seem like a matter of channel preference, it also reflects a central efficiency challenge.

Agents may be hard to reach because they are tied up with other calls or chats - interactions that should be moving a lot faster than they are. Many customers, moreover, only want to reach live agents because self-service tools have proven inaccurate, unintuitive, or unproductive. If a company delivered low-touch digital experiences that “just worked,” it would reduce effort, boost efficiency, and, ultimately, mitigate concerns about agent availability.

The takeaway here is simple: for all the talk about customer empowerment, today’s consumers are not extravagant in their demands. They generally just want companies to get the basics right. Few companies, however, have even mastered those core tenets.

And contrary to a popular misconception, the majority of customers are not tempering their expectations in the wake of COVID-19. Over 32% of customers say they are no more willing to tolerate the aforementioned “pain points” and inefficiencies. More than 17% are actually less willing to accept suboptimal experiences, while 18% were more forgiving during COVID-19 but plan to revert to their original standards and expectations moving forward.

Which of these qualities is MOST important when getting customer service?

- Speed and efficiency: 33.33%
- Accuracy of information and resolution: 41.97%
- Empathy / proving they “care”: 17.99%
- Personalization / proving they “know you”: 2.16%
- Omnichannel / supporting you where and when you want: 4.56%
Which of these issues do you often encounter when interacting with companies?

- Long wait times before getting help: 56.14%
- Representative is slow, frequently goes silent and/or puts you on hold: 35.90%
- Multiple transfers: 40.00%
- Want to chat in digital, they make you call: 24.10%
- Want to call, they make you use digital: 21.69%
- Having to repeat information during the interaction: 32.77%
- Representative doesn’t seem to know you / your issue: 25.30%
- Representative doesn’t seem friendly or interested in helping: 20.72%
- No personalization; rep just reads generic policies and information: 22.65%
- Hard to find the right person or channel for your issue: 27.47%
- You’re told they can’t help you due to “policy”: 18.80%
- Automated voice menus aren’t helpful: 37.35%
- Difficult, if not impossible, to speak to live agent/representative: 33.25%
- None - your customer service experiences are always great: 6.27%

How has COVID-19 affected your willingness to accept these issues?

- 25.30% More willing to tolerate these issues
- 17.83% Was more willing to tolerate them during COVID, but won’t moving forward
- 7.23% Wasn’t willing to tolerate them during COVID, but will moving forward
- 17.35% Less willing to tolerate these issues
- 32.29% No change
WORK-FROM-HOME, THROUGH THE CUSTOMER’S EYES

A fringe topic in previous years, the work-from-home model took center stage in 2020. Due to mandatory quarantines, urgent resource gaps, and a general concern for their employees' well-being, more than 80% of contact centers turned to remote work in the face of COVID-19. More than 73% plan to make remote work a permanent scenario for at least some employees moving forward.

When thinking about work-from-home, organizations routinely (and understandably) focus on the agent experience. They consider strategies for offering remote training, keeping agents engaged, and facilitating remote collaboration. They account for matters related to employee comfort and happiness. They also plot schemes for potential “hybrid” models in which some employees would come into the physical office some of the time.

As they evaluate these different questions and challenges, they cannot, however, forget the ultimate goal of the entire customer contact operation: delivering a better customer experience.

Indeed, leading companies will view their work-from-home experience through the eyes of their customers. Will customers know that the agent is working from home? More importantly, will the experience suffer to such an extent that customers care that the agent is working from home?

The ideal answer is “no.” Today’s consumers certainly understand the challenges that come with working from home, but the majority are unwilling to tolerate a markedly lesser experience. They still need to feel that the agent is able to efficiently and effectively answer their questions and solve their problems.

They will specifically take offense to low-quality phone conversations, such as those that are hard to hear or get disconnected. Nearly 52% of consumers say a low-quality phone experience with an at-home agent would leave them with a negative impression of the brand.
Other work-from-home challenges that would hurt the brand’s customer relationships include employees who do not seem knowledgeable or well-trained (a problem for 46% of consumers), disengaged, bored, or tired employees (42%), background conversations from roommates or family members (40%), and other sorts of background noise (37%).

The truth is that distracting background noise, poor connection quality, and unhelpful employees would damage customer relationships even in a traditional call center or office environment. Telephony equipment is a major priority for contact center leaders, and employee training and engagement rank highly on nearly every leader’s priority list.

Work-from-home, however, can amplify these concerns. Call quality is by no means perfect in a traditional contact center, but it generally meets at least an acceptable standard. The typical office environment offers decent equipment, stable connections, and sufficient space between employees. Employees, meanwhile, have ready access to in-person training and support.

The home environment, on the other hand, makes no such guarantees. Agents may not have modern phone or computer equipment, let alone a powerful Internet connection on which to use that equipment. They may also be sharing tiny spaces with spouses, children, or roommates, none of whom have any appreciation for (let alone incentive for staying silent. And even if they become comfortable with remote work tools like Zoom and Slack, they cannot wholly replicate the simple power of face-to-face benchmarking, collaboration, and guidance.

When designing their permanent work-from-home offerings, companies need to account for these limitations. They need to develop protocol for equipment and connection speed - whether that means supplying agents with necessary tools or asking those without modern equipment to report to the office. They will, similarly, need to establish standards and protocol for workspaces to make sure agents are not performing (or at least not answering calls) from a disruptive environment.

Improving knowledge bases, simplifying desktops, using AI augmentation tools, and leveraging real-time learning solutions will also go a long way in ensuring agents can get up-to-speed quickly. These agents will, in turn, be more confident and helpful during customer interactions.

### Suppose you spoke to a customer service representative who was working from home. Which of the following would leave you with a negative impression of the company?

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<th>Percentage</th>
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<td>40.24%</td>
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<tr>
<td>Hear other sorts of noise, such as air conditioners, police sirens or loud TVs</td>
<td>36.63%</td>
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<tr>
<td>Phone call quality is poor, hard to hear and/or gets disconnected</td>
<td>51.81%</td>
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<td>Employee takes too long to look up information about your issue or account</td>
<td>23.37%</td>
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<td>Employee doesn’t seem well-trained or knowledgeable about the issue</td>
<td>45.78%</td>
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<tr>
<td>Employee seems bored, tired or otherwise disengaged</td>
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CUSTOMERS ARE FINALLY EMBRACING THE DIGITAL TRANSFORMATION

Although it was not quite as universal as adopting remote work, turning to digital channels was a very widespread reaction to COVID-19. Facing increases (or at least some form of fluctuation) in interaction volume, questions about unfamiliar issues, and resource concerns and limitations, many brands urged customers to use low-touch digital environments, including no-touch chatbots. Some even eliminated voice calls as an option.

On the one hand, this accelerated “digital transformation” represented a customer-centric development. After so many years of talking about digital engagement, companies were finally going to serve customers in the channels they use in their everyday lives. They were finally going to free customers of lingering, phone-centric pain points like long wait times and frustrating IVRs.

On the other hand, there was ample reason for concern. Although consumers clearly value digital channels in principle, they have largely been disappointed with digital customer experiences. CCW Digital’s 2019 Consumer Preferences Survey revealed sobering statistics about digital engagement; the majority of consumers still preferred the traditional phone channel for customer support issues. Despite the channel’s notorious inefficiencies, they still believed voice was the fastest option for getting their problems solved. They were particularly bearish on chatbots, with only 9% of consumers saying they trusted bots to solve their problems.

And it is not as if companies were overly confident in their digital capabilities. Few confirmed meaningful success with automated engagement in CCW’s 2019 studies, and many identified digital capabilities as an urgent improvement area.

A staggering 87% of companies, moreover, believe they can better educate customers on the value of digital.

Despite the lingering limitations and warranted pessimism, brands nonetheless proved capable of digital engagement during COVID-19. Their emphasis on digital was fairly successful, and customers are now demonstrating an unprecedented level of comfort and enthusiasm for digital environments.

In the wake of COVID-19, 82% of customers say they are more comfortable using digital channels for at least some customer support issues. A healthy 32% are comfortable using digital channels for all issues.

The numbers are also promising for self-service specifically, with 86% of consumers expressing a willingness to solve problems on their own using tools like chatbots, instructional videos, and even the historically maligned IVR. More than 53% are already comfortable with these platforms; the remaining 33% are theoretically open to self-service but have not yet seen sufficient proof of success.

No, the urgent pivot to digital was not flawless. Some customers still have reservations about using self-service platforms. Some customers still have reservations about taking serious issues to any digital platform. The key, however, is that customers are markedly more accepting of these channels than ever before. They do see them as viable customer engagement options, which represents a game-changing development for organizations that have long wanted to make omnichannel - and all its efficiency, intelligence gathering, and technological advantages - a reality.
To create even more comfort and satisfaction in the digital world, companies will want to make support options easier to find. Nearly 61% of consumers say good digital experiences make it “easy to find help.”

Other leading digital demands include access to a live agent for additional help (60%), mobile-friendliness (55%), the ability to solve most problems within the actual digital channel (48%), and seamless escalation to the phone when needed (39%).

A simple reading of these preferences would suggest that consumers want to have their mobile cake and eat it too. They want “full-service” digital experiences that can solve most problems yet still expect seamless escalation to live phone agents.

The more logical reading, however, is that customers are demanding frictionless mobile experiences. Each of these demands - easy-to-find support options, compatibility with mobile devices, less need for escalation yet less trouble in the event it is necessary - speaks to the belief that a great digital customer experience is an easy one.

Considering the fact that customers routinely endure slow, effort-intensive phone conversations and value speed and accuracy over heavy personalization, this demand for frictionless digital experiences makes perfect sense. Why migrate to an environment famous for its convenience and seamlessness if the experience in that environment does not live up to the billing?

As they work to strengthen their digital channels, customer-centric brands will also pay attention to their official website and search engine optimization strategy. More than 50% of consumers say they check the company website or search the web for answers before engaging in a traditional support channel.

How has your perspective about digital/online customer support changed as a result of COVID-19?

- 32.05% More comfortable using chat/messaging/email/chatbots for all issues
- 50.12% More comfortable using chat/messaging/email/chatbots for some issues
- 17.83% Less comfortable using chat/messaging/email/chatbots
- 53.14% Yes - already comfortable using these self-service tools
- 33.09% Could be comfortable in the future, but you haven’t yet had much success with bots or voice menus
- 13.77% No - support should always come from an employee

Are you comfortable solving customer service issues on your own (without help from a representative), such as via chatbots, FAQ pages, instructional videos, or automated voice menus?
What defines a good customer service experience in digital channels like chat, email and messaging?

- Easy to find help on the website/app: 60.63%
- Easy to use on mobile devices: 54.83%
- Access to a live agent if you need additional help: 59.66%
- Can solve most or all issues within digital channel (no need to escalate to phone): 48.31%
- Can easily escalate to phone if needed: 38.65%
- Clear menus and interface: 36.23%
- Conversations are personalized to you/your account/your issue: 28.50%
- Can share screen, videos or documents with representative: 18.12%
- Can easily make payments within the online interface: 26.09%
- Proof of security and privacy: 30.19%

Suppose you have a customer service issue. In general, how would you FIRST try to resolve the issue?

- Search the web (Google, Bing, etc) for solutions: 25.36%
- Check the company website and/or product manual for solutions: 25.60%
- Check social media for solutions: 8.21%
- Use a chatbot, voice menu or other self-service tool: 10.14%
- Use digital support, such as email or live chat: 12.32%
- Call to speak to an agent: 18.36%
COVID-19: SHIFTING PRIORITIES, CHANGING THE GAME

COVID-19 changed perspectives about the customer experience. It made consumers more cognizant of brands’ customer experiences -- and more comfortable using their digital channels.

It also had a direct impact on brand offerings and customer behaviors. Many brands had to transform their goods and services to account for factors like social distancing and job loss. They also had to change their support processes to account for dramatic changes in interaction volume and customer sentiment.

Consumers, meanwhile, had to adapt their purchasing habits to a world in which merely stepping out of the house and interacting with people became a risk.

By virtue of how brands handled the transition, consumers gained a better sense of whom to trust - and support - moving forward. By virtue of how they are approaching the new world, consumers will help companies further retool their offerings and messaging.

When it comes to brand response, the most customer-centric gesture was being transparent about potential customer experience challenges, such as longer wait times when calling. More than 57% of consumers say they were impressed with and potentially became more loyal to - brands that demonstrated transparency.

Brands that proactively announced changes, such as those concerning fees or policies, scored points with 41% of customers. Brands that relaxed relevant policies (such as those regarding late fees) (37%) and offered more digital engagement opportunities (34%) also proved resonant during the COVID-19 pandemic.

E-commerce will play a central role in the customer response. More than 49% of consumers say they will make fewer trips to brick-and-mortar stores even when the pandemic subsides, while 48% will buy more products online (including essentials). Other post-COVID changes include more frequently leveraging curbside or in-store pickup (34%), and reducing live entertainment (34%) and restaurant (33%) visits.
Many companies had to adjust their customer service strategies as a result of COVID-19. Which of the following changes impressed you and/or made you more loyal to the brand?

- Proactive communication about fees, policy changes, etc: 41.25%
- Transparency about likely customer experience challenges, such as longer wait times: 57.31%
- More opportunities to get support in online/digital channels: 34.53%
- Customer service agents/reps expressed overall concern for your safety and happiness: 32.37%
- Customer service agents/reps were faster and more concise during conversations: 19.90%
- Relaxed policies (no late fees) or other discounts and incentives: 36.69%
- Nothing - I was generally upset with customer service during COVID-19: 8.39%

Will you make any of the following changes to your shopping/purchasing habits as a result of COVID-19, even when the pandemic subsides?

- Buying more products online (for delivery), including essentials like groceries: 48.43%
- Using in-store/curbside pickup more frequently: 33.98%
- Fewer trips to stores: 49.16%
- Prioritizing stores with proven health/safety/cleanliness policies: 31.33%
- Less likely to return/exchange products: 13.73%
- Less likely to attend restaurants or bars, even when they’re fully open: 32.77%
- Less likely to attend live entertainment, such as sports, plays, movies or concerts, even when they’re fully open: 33.98%
- Nothing, I expect to return to my original shopping habits: 13.49%
CUSTOMER-CENTRIC INNOVATIONS

The best innovation has a purpose. It solves a real problem or creates real value.

In a customer experience context, the best innovation creates value for customers. It leads to more satisfying engagement journeys. Based on this notion, call back solutions definitely warrant the customer contact community’s attention.

Unsurprising given their frustration with long wait times, 53% of consumers say the option to receive a call back at a convenient time would increase their satisfaction level.

Also unsurprising given their increased interest in frictionless digital experiences, 44% of consumers would derive satisfaction from a convenient text messaging option.

Other customer-centric ideas and solutions include providing a direct response to feedback or complaints (32%), representatives already knowing who the customer is and why they are calling (26%), the elimination of knowledge-based authentication questions (26%), and proactive support alerts via text or email (26%).

Given last year’s revelation that consumers generally do not feel brands care about their thoughts, efforts to close feedback loops will obviously go a long way in restoring trust and satisfaction. Along with a pro-customer mindset, this endeavor requires effective voice of the customer, case management, and CRM solutions.

Analytics solutions, particularly those that leverage AI and CRM integration, can help agents more quickly identify customers’ identities and intentions. Automated security solutions, such as biometrics or ownership-factor technology, can reduce the need for cumbersome authentication questions. Customer analytics, marketing automation, and omnichannel contact center platforms can make proactive communication a reality.

To put it simply, the most promising customer experience transformations are already possible thanks to existing marketplace technology. Coupled with the fact that customers care more about the experience than ever and continue to complain about the same inefficiencies and “pain points,” there is no excuse not to take action.

Dubbed the Practicality Guide, the balance of this report features an unprecedented set of recommendations for taking that action – and an exclusive set of case studies that prove success.
### Which of the following would make you more satisfied as a customer?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company will call you back at a convenient time instead of making you wait on hold</td>
<td>52.90%</td>
</tr>
<tr>
<td>Company lets you get support via text message - at your own convenience</td>
<td>44.20%</td>
</tr>
<tr>
<td>No need to answer identification questions like mother’s maiden name, favorite sports team, etc</td>
<td>25.85%</td>
</tr>
<tr>
<td>Representative knows who you are and why you’re calling at the start of the call</td>
<td>27.54%</td>
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<tr>
<td>Company sends proactive texts or emails containing necessary support information</td>
<td>25.85%</td>
</tr>
<tr>
<td>Company lets you speak in your native language / can translate in real-time</td>
<td>10.87%</td>
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<tr>
<td>Company calls just to &quot;check in&quot;</td>
<td>9.90%</td>
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<tr>
<td>Company makes it easier to share feedback</td>
<td>19.08%</td>
</tr>
<tr>
<td>Easier to find answers in the company’s knowledge base</td>
<td>25.60%</td>
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<tr>
<td>Company always responds to your social media messages (praise or complaints)</td>
<td>17.39%</td>
</tr>
<tr>
<td>Company always responds to your direct feedback or complaints</td>
<td>31.88%</td>
</tr>
<tr>
<td>Company connects to apologize after a heated conversation</td>
<td>14.98%</td>
</tr>
<tr>
<td>Company lets you solve most or all problems on your own via chatbot or voice menu</td>
<td>17.39%</td>
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AUGUST 2020 MARKET STUDY

Practicality Guide

Customer experience case studies, expert tips, and practical exercises that you can bring back to the office.
There is no denying the struggling customer experience and service landscape in modern commerce. However, with challenging economic times comes great opportunity for customer-centric brands to differentiate themselves from competitors — competitors that refuse to adapt to a more digital environment, or refuse to recognize the emerging trends customers are providing.

The difficult part is being able to collect and understand those trends so that we can provide employees and customers the resources to differentiate our brands by delivering better experiences for the rapidly changing modern and future consumer.

**DIGITAL AND MOBILE CX**

Even before the pandemic took place, consumers were already increasingly expecting brands to be more innovative in the experiences they delivered to customers. This means customers were expecting more out of their digital experiences (particularly mobile experiences) and wanted companies to continuously introduce new innovations that fit their changing needs and solved their most pressing problems. For example, according to the *2019 Salesforce State of the Connected Customer report*:

68% of customers expect the rate of innovation from companies to accelerate. 67% of customers expect companies to provide new products and services more frequently than before — up from 63% in 2018. 74% of customers expect companies to use existing technologies in new ways to create better experiences. What’s interesting to note is that many trends and the technologies customer-centric brands used to capitalize on them were already emerging. However they have been expedited at an exponential rate.
“The adoption or adaption of existing technologies, depending upon how you look at it was thrown three to five years in the future... We would have gotten around to a lot of what we’re using now that we didn’t use much of before at the level we’re using now but it might not have been for another few years so we’re moving at high speed.” WSJ and NYT bestselling author and CX and customer service influencer, Shep Hyken

More specifically, COVID-19 accelerated the digital imperative. As trends continue to evolve, customers are spending more time in front of screens than ever before. 54% of customers are now browsing the internet more than usual (Salesforce Research Snapshot Series, 2020). And according to CCW Digital’s 2020 Consumer Preferences Survey, 55% of customers believe that a good customer experience within digital channels is best defined by being easy to use on mobile devices.

Consumers across all demographics are spending increasing amounts of time interacting on digital channels with brands, such as mobile devices. Delivering great digital experiences is no longer a nice-to-have, it’s critical to the present and future success of every business.

EMPATHY AND PERSONALIZATION THROUGH DATA

COVID-19 has also accelerated the customer need for flexibility and empathy. Customers want companies to understand them and their unique situations and inquiries through data-driven personalization.

“For instance, if your honeymoon flight was cancelled due to COVID you probably don’t want flight credit to use within 6 months; you want a full refund to use for something else.” Julian Walker, Sr. Product Marketing Manager, Salesforce

COVID-19 has also introduced new customer expectations for, specifically, personalized, in-person experiences. The right safety precautions and measures must be in place before a customer will feel comfortable in those in-person settings.

As health precautions and government regulations change daily at the state and county levels, journeys are going to continuously evolve quickly which means companies must be agile and ready to change their experiences or journeys at the drop of a dime depending upon both consumer preferences and regulations, all while maintaining data-driven empathy and personalization. In other words, designing individualized customer journeys during this period of immense change requires companies to listen to their customers more than ever before.

“Increased focus on human factors (like empathy) during interactions and training” has been a strategic priority for roughly 50% of CX leaders during the pandemic, according to CCW Digital research.

These numbers are and should continue to grow as consumers continue to grow more sensitive to marketing tone or language, have less money to spend on services and products (as a result of the macroeconomic state we’re living in), and support brands that align with their individual goals.

And as call volumes and customer inquiries rise as a result of the e-commerce shift, tension in the contact center is inevitable. During this time, where stress levels are at an all-time high, organizations should work to ensure positive CX loyalty on a more personalized basis. In today’s world, 71% of customers believe businesses that show care/empathy have earned more loyalty during this time. (Salesforce Research Snapshot Series, July 2020).

A significant majority of customers are more than ready for brand humanization, heavily dependent upon the right formulaic approach to personalization and empathy.

DELIVERING INSTANT ENGAGEMENT

“The easiest way to detect emerging trends that will impact the customer journey is to do so qualitatively by talking to customers directly or talking to the folks who are in contact with customers everyday, like customer service reps and field team members.” Julian Walker, Sr. Product Marketing Manager, Salesforce

When it comes to digital CX, customers want: seamless experiences across channels and devices. 78% of customers prefer to use different channels depending on the context (i.e. where I am / what I’m doing). 73% prefer to use different devices depending on the context (i.e. where I am / what I’m doing) (2019 State of the Connected Customer).
Technology required to deliver seamless experiences include a single platform that has all digital touchpoints natively integrated, from phone and email to self-service portals, to chat and messaging (i.e. SMS, WhatsApp, Facebook Messenger). This allows companies to easily meet customers on any channel at any time, wherever they are.

Technology required to help companies better understand customer needs and expectations include a complete customer view where data from every touchpoint is integrated into a single view. This gives employees a holistic look at the customer to better understand them. Plus, the extra data will allow AI to provide more personalized recommendations and relevant information through actionable data over time.

When contacting customer service the top two qualities customers are looking for in today’s world are expertise and speed (Salesforce Research Snapshot Series, July 2020)

Technology required to help companies provide instant digital engagement include: AI-powered chatbots that can solve customer issues instantly while also providing the option to transfer to an agent if needed. Self-service channels, like portals, help centers, and communities, where customers can quickly find answers for themselves.

It’s critical for management to acknowledge these trends and give agents the technology and flexibility they need to succeed at delivering quality customer experiences.

**EMPOWERING AGENTS THROUGH AI**

AI unlocks the opportunity for companies to do more with fewer resources, increase productivity, and ultimately get customers their answers faster.

82% of customer service organizations using AI have seen increased first contact resolution. 79% of customer service organizations using AI have seen reduced average handle times (Salesforce Research Snapshot Series, July 2020).

AI is assistive to agents. In many cases, it frees up customer service agents to focus on higher level work and more complex cases. When it comes down to it, AI enhances the customer experience and contributes to higher customer satisfaction. In fact, 79% of customer service organizations using AI have seen increased CSAT or NPS.

A flexible CX will allow companies to quickly adapt to changing customer needs. To empower agents, we must equip them with a complete view of every customer - this means they have access to the information from every customer touchpoint (service, sales, marketing, commerce, etc.) to alleviate communication silos and customer friction.

Flexibility - 69% of employees want to work from home full time or split their time between home and the workplace.

This means many of your agents who traditionally worked in a contact center full time will likely want the opportunity to work-from-home (or anywhere) more frequently. According to CCW Digital research, nearly 75% of contact center, customer service/CX, and marketing leaders see remote work as a viable option after the pandemic, for at least some employees.

In this work-from-anywhere world, agents need flexible workspaces and tools (e.g. integrated cloud telephony, natively integrated channels, embedded learning/training, virtual collaboration tools) that will allow them to seamlessly transition from home to the office or anywhere.

This is a time when the world is vulnerable, where every person and organization is adapting to life with a live virus in their midst, where no one is operating from a best-in-class pandemic playbook. Brands, including marketers and customer service departments must become the very people they’re trying to reach. This means that among innovation, compliance, time and technology, humanity must become the greatest application.
If you fall behind customer and agent demands, you will fall behind your competitors.

For starters, brands that cannot anticipate (and address) customer needs are literally handing those customers to the competition. As the Consumer Preferences Survey reveals, a whopping 66% of consumers consider an alternate provider after just one or two bad interactions.

Making matters worse, as they scramble to put out existing fires, they divert additional resources from developing a more proactive, customer-centric approach to engagement. This further restricts their upside -- and gives competitors an even bigger opportunity to pull ahead.

By dramatically changing the engagement landscape, COVID-19 illuminated -- and exacerbated -- this challenge. Companies that were already struggling to deliver a great phone experience from their contact centers suddenly had to deliver amazing digital experiences with a distributed, at-home workforce. They, moreover, had to make this adaptation while dealing with surging contact volume, changing customer expectations, shrinking resources, and marketplace uncertainty. Suffice it to say, they ran into significant challenges and endured tangible costs.

COVID-19 did not, however, merely highlight the downside of a reactive approach to customer contact. It also uncovered the upside of a proactive one.

Brands that were simultaneously flexible enough to accommodate the new contact center normal and predictive enough to anticipate changing customer and agent expectations have flourished, at least to the extent a brand can in today’s trying times. They are experiencing increased comfort in digital channels, increased productivity from their agents, and increased customer trust throughout the journey. They are not simply keeping up with the changing atmosphere but instead jumping past their competition.

What does it take to achieve this agile approach to customer contact? What does it take to proactively excel on the customer and agent experience fronts? This briefing will reveal the answers.
PROACTIVELY MEETING CUSTOMER NEEDS

No brand can perfectly forecast every conceivable customer request. No brand can flawlessly preempt every conceivable challenge.

Customer-centric ones can, however, leverage predictive intelligence about what customers will want and how they can behave to design the best possible experience. And whether that leads to proactively solving common problems or at least responding to unpredictable inquiries in a personalized, productive manner, it will heighten customer satisfaction, grow loyalty, and establish competitive differentiation.

“Anticipating and predicting the needs of the customer before they start their journey is where you have to begin,” recommends Jarrod Johnson, CCO for TaskUs. “From there, it’s about reacting well, being responsive, and meeting the customer where they want to be met while delivering on your brand promise.”

The ability to more proactively meet customer needs hinges on several key principles. First and foremost, it requires an omnichannel approach to customer insights. Instead of relying on limited survey feedback from select customers in a few channels, customer-centric organizations evaluate all interactions from the entire journey. By subsequently harnessing the power of artificial intelligence, they can perform robust analysis on this data - and gather actionable insights about root causes, customer intent, and common experience pain points.

Gathering this additional insight is for naught, however, if the company does not have a way to act on the intelligence. If it cannot use what it is learning about customers to create more productive conversations and more seamless journeys, it will neither reduce customer effort nor increase customer happiness.

Taking action involves two crucial steps. It first involves establishing support for the full gamut of contact channels. Certain customers prefer certain channels. Certain issues are best-suited for certain channels. And certain events will require companies to leverage specific channels to manage workload and volume. By achieving strong capabilities in all channels - and then ensuring they are seamlessly connected - the organization ensures it is always in position to meet customer needs.

“Consumer expectations have changed,” adds Johnson. “Contactless delivery, increases in online purchases, completely new social norms for interaction; all these things are changing how we interact with and serve customers. We all have to adapt but brands that have flexible, agile approaches to meet customer needs and a modern technology platform to make it happen will take a bigger share in this environment.”

In addition to establishing omnichannel support, acting on customer intelligence also requires employee empowerment. If key stakeholders are not armed with relevant data and then given the flexibility to adapt in the moment of truth, they will have no chance of making the optimal connection with customers.

PROACTIVELY MEETING AGENT NEEDS

A great customer experience hinges on a great customer experience. The effort to get ahead of customer demands, accordingly, hinges on the ability to proactively address agent needs.

Always a concern, anticipating employee needs has become a particularly pressing topic amid the COVID-19 pandemic. In addition to offering a broad reminder about the possibility of sudden change, COVID-19 led to a surge in remote work. More than 80% switched to a work-from-home model in the face of the pandemic, and 73% say it will be a permanent option for at least some employees moving forward.
“Most companies with a [preexisting] work from home model primarily extended those benefits to trusted support resources and higher level employees,” explains Michael Thigpen, head of client technology services for TaskUs. “With COVID-19, organizations with minimal experience with remote work and security capabilities, were forced to move employees home to sustain business support. Many companies had no idea how they were going to monitor, perform tech support, and coach employees.”

Indeed, remote work introduces a host of new challenges and uncertainties. By definition, it also creates physical distance between employees, thereby restricting the ability to spot urgent needs, performance issues, and changes in sentiment.

“In the current work from home environment, companies should focus on employee engagement throughout all aspects of training and the employee lifecycle,” says Reema Vaghani, VP of Learning Experiences for TaskUs.

To address these challenges, it is imperative to leverage elevated digital engagement opportunities. Advanced workforce management and remote learning solutions allow companies to consistently spot performance needs - and arm agents with the necessary skills and resources. The strategic use of remote collaboration tools, such as for check-ins and coaching sessions, creates another opportunity to learn about employee needs, address sentiment and morale issues, and attain greater engagement.

“At TaskUs, we have increased our touchpoints, feedback, team huddles, and review sessions to provide support to our employees all over the globe,” adds Vaghani. “We also provide continuous learning sessions to deepen skillsets, knowledge, and competencies. As a result, our teammates are prepared to handle unpredictable volumes and through these ebbs and flows, our team leaders provide unwavering support.”

Additional technology opportunities involve leveraging advanced CRM systems and knowledge bases that give agents seamless access to actionable intelligence. Support for omnichannel communication and remote system access helps agents steadily perform even in non-traditional environments.

The strategic use of process automation, meanwhile, improves agent efficiency (and increases their customer-centric focus) by completing rote, repetitive tasks and processes. It also helps the company maintain a consistent service level as agents adapt to sudden changes, new processes, or intense learning curves.

Finally, automation can extract meaningful insights from key enterprise systems, in turn arming agents (and customers) with answers to key questions and/or next-best action recommendations.

“In a tactical way, RPA helps automate ‘dull, dirty, and dangerous’ tasks that humans are not suited for, including task automation for agents and customers,” elaborates Manish Pandya, SVP of Digital for TaskUs. “An example of this would be rule based RPA and simple requests/responses for voice, chat, email, and other interactions...In a strategic way, which is where automation is evolving, automation is augmented with AI and machine learning solutions at an exponential pace which enable humans to perform more complex tasks. This is where RPA transforms into IPA (Intelligent Process Automation), and works with unstructured data like images, text, and documents. This provides proactive and reactive information that helps both agents and customers.”

PROACTIVELY MEETING OPERATIONAL NEEDS

Although remote work may be a challenge for unprepared organizations, leading brands recognize that it can be an opportunity.

COVID-19 did not, after all, merely change day-to-day work environments. It also provided a reminder that change can occur - and thus an incentive to plan for business continuity.

Remote work (and, really, the broader idea of a distributed workforce) is the centerpiece of a strong business continuity strategy. Coupled with cloud contact center solutions, a remote work strategy frees organizations of the shackles of rigid processes, restrictive service capabilities, legacy systems, and on-premises contact center environments.

No matter what happens in a given region, the company is ready to adapt - and continue delivering exceptional customer experiences.

Along with improving agility, a distributed contact center model helps companies steadily elevate their experiences.
By opening the door to a stronger talent pool and facilitating partnerships with cutting-edge business process outsourcers, the model will lead to better productivity and more demonstrable customer centricity. As their competitors struggle to meet existing company needs, they will be empowering their higher-caliber, more flexible workforce to go above and beyond.

Granted, all continuity measures are not created equal. Those leveraging remote work will still have to support their teams with the best possible systems, data, training, and engagement strategies. Those leveraging outsourcing will need to seek partners that are not only adept at those skills, but also making use of innovative contact center technology, advanced workforce empowerment strategies, bulletproof security measures, robust customer intelligence tactics, and employee-centric environments.

"COVID-19 has adequately tested the resilience of both employees and organizations in all sectors and industries in these unprecedented times," says Mohit Shah, SVP of WFM and Data Analytics for TaskUs. "Companies should be looking for outsourcing partners that can quickly pivot their service models and/or grow from multiple locations or geographies leveraging their work from home practices. While clients expect their outsourced partners to ramp quickly in such scenarios, they also expect them to take utmost care of their employee’s safety and wellness.

"Leveraging technology to monitor and manage workforce efficiency in real-time is vital and becomes a true differentiator for clients looking to outsource. The use of technology to virtually connect employees with their teams and management also becomes critical in order to preserve relationships. Organizations operating in this new ‘distributed workforce’ should also have a set of robust data and information security policies established to ensure high levels of data security and promote a distraction-free and a stable, secure work environment."

THE POWER OF PROACTIVITY

Customers will not wait for you to catch up. They will not markedly temper their expectations as you redesign journeys and overhaul processes. They will, instead, look to competitors who are already adapting to change - and already fulfilling their needs.

A proactive approach to the customer contact function, therefore, represents a cornerstone of business success. It takes steady insight into how the market is changing - and operations flexible enough to adapt and scale on a moment’s notice - in order to differentiate from competitors and consistently connect with customers.

By partnering with TaskUs, leading organizations are achieving this flexibility - and thus attaining competitive advantages.

An example success story follows:

**Company: Leading digital currency exchange company**

**Challenge:** In the midst of quarantine, a leading digital currency exchange company experienced a sudden surge in support volumes. They needed 150 agents over the course of four weeks or they risked losing customers. This was especially difficult because the company solely operates with their own provisioned hardware and chromebooks. They partnered with TaskUs to solve their business continuity issues.

**Solution & Result**

To quickly scale, TaskUs created load balancing, which is when teammates from other campaigns support each other during peak support periods. As a result, TaskUs was able to deliver a total of 240 teammates, 200 internal and 40 external. To solve the issue of onboarding hundreds of teammates, TaskUs split them into smaller groups, and leveraged IT analysts to help prep the team. This cut the total onboarding time from seven hours to two, enabling teammates to deliver support quickly. To abide by the client’s hardware rules, TaskUs partnered with procurement and other sites to purchase additional chromebooks, and farmed them into the site as client owned. This put TaskUs at an advantage compared to other vendors, and gained client trust and confidence.

This leading currency exchange company is now equipped with a seamless and scalable WFH program and a solid business continuity plan that will help foster the success of any future risks to business.
It may have been a staple of customer contact conversations, but the digital transformation remained elusive in practice. Companies struggled to deliver valuable digital experiences, and customers in turn dismissed chatbots, messaging, and social media as unproductive service environments - even if they preferred these channels in their everyday lives.

At the time of CCW’s 2019 Consumer Preferences Survey, phone still dominantly ranked as customers’ most preferred service option. Trust levels in chatbots and messaging were comparatively non-existent.

The 2020 COVID-19 pandemic dramatically changed this landscape. Facing surging contact volume and research limitations, companies had no choice but to accelerate their digital adoption.

“Digital transformation tools were once seen as an investment that could be saved for another time,” remarks Judi Hand, CRO of TTEC. “Customer-facing organizations quickly woke up to the mission-critical benefits of digital tools when they had to deploy solutions quickly. We recently surveyed our LinkedIn audience about how COVID-19 impacted their company’s digital transformation strategy. 45% say it accelerated their plans, and another 24% said they are planning to accelerate their strategies.”

In general, customers are reacting favorably to the development. The 2020 Consumer Preferences Survey reveals that 82% of customers are now more comfortable using digital channels for at least some issues.
A promising 32% are more confident in digital for all issues. Customers are also more willing than ever to use chatbots and other digital self-service options.

This increase in comfort, however, will coincide with an increase in expectations. The more customers begin to use digital channels by default, the higher their standards will be for engagement. They will count on digital channels to deliver fast, consistent, accurate interactions. The majority of consumers, meanwhile, say they want these channels to be easy to use, mobile-friendly, and seamlessly connected to the traditional voice environment.

An increased preference for digital, moreover, does not coincide with a decreased demand for humanity. Customers still want to engage with brands who know and value them, which means companies have to bring humanity to the digital world.

“Digital transformation will unlock a new environment, but it’s the people that represent your brand who will actually deliver the amazing experiences that customers will remember,” adds Hand. “Use technology as the enabler of those experiences.”

This briefing will reveal how to empower your contact center operation, notably including your frontline employees, to deliver a frictionless, customer-centric experience in the digital world.

“Digital transformation is here to stay,” declares Hand. “The pandemic created a cultural and behavioral shift that is going to drive new innovations in the field. The contact center must take the opportunity to be at the forefront.”

DESIGNING CUSTOMER-CENTRIC JOURNEYS

Channels are not the end goal. They are a means of delivering the best possible experience for a given customer with a given intent. They are a platform for customer centricity.

This reality has two important takeaways for the customer experience operation. First, it is imperative to deliver the right experience within each channel. Different channels offer different advantages and therefore yield unique customer expectations. Customer-centric brands embrace this reality to ensure they are maximizing each moment of truth, in turn creating stronger relationships with customers.

Their bots, for example, make use of visual menus to improve navigation and better capture customer intent. Their messaging teams accommodate asynchronous communication to allow customers to conveniently communicate on their own terms.

“The best experiences understand how to meet customers differently on each channel all while delivering the same brand experience,” explains Hand. “From voice to message, every platform has various expectations.”

Customer-centric brands additionally recognize the importance of the overarching journey. Instead of optimizing channels in isolation, they emphasize cohesion between all touch points. They ensure customers can seamlessly move to the right destination for their issue.

They also consider where the customer is within the journey, and tailor experiences to that reality. This may involve “popping up” a chatbot to a customer who first arrives on the technical support page. Alternatively, it may mean recommending a phone escalation to a customer who has spent 5 minutes in an unproductive chat conversation.

“Consider where your customers are in their journey when they contact you online,” notes Hand. “Additionally, ask yourself how many steps they need to go through to reach assistance (FAQ, assistance bot, or agent). If it’s difficult to reach help on these channels, then you’re quickly becoming irrelevant.”

Not simply useful for routing and broader journey orchestration, cognizance of a customer’s journey informs future conversations. A customer who escalates to a voice agent after spending 15 minutes bouncing around the website should receive a more empathetic tone, for example, than a customer who specifically and initially chose to call for support.

A look across the journey also helps companies determine the best opportunities for automation, including self-service. Companies that know where customers go for certain issues - and what pain points they experience during that process - have a clearer sense of what, where, why, and how to automate.
"As you focus on transforming your organization’s customer service to one that truly puts the customer’s intent at the forefront, AI and automation will be two of the most important technologies to support what will become a channel-less approach," elaborates Hand. "The focus will be less on the channels and more on the customer journey as siloes become more integrated and incremental digital transformation permeates the enterprise."

LEVERAGING ACTIONABLE INTELLIGENCE

When it comes to customer data, the digital transformation simultaneously represents a major opportunity and a significant responsibility.

On the one hand, the introduction of new touch points gives companies unprecedented access to customer intelligence. On the other hand, it heightens the risk of silos. In order to gain the most accurate window into their customer journeys, companies cannot allow these fragments to develop. They have to unify exponentially more data from significantly more touch points.

By achieving this unification, companies will gain the intelligence needed to radically improve their experiences. With nuanced insight into customer intent, customer behavior, and customer sentiment throughout the entire journey, companies can eliminate pain points, orchestrate better journeys, improve routing processes, strengthen conversations, and even improve agent coaching and training.

The first step to unlocking actionable intelligence is to leverage a robust, omnichannel analytics platform. Impervious to the statistical limitations and biases of survey feedback, these solutions gather insights from every interaction in all channels. Further, they can gather insights from between channels to determine what customers experience as they navigate the journey.

"Historically VOC programs were primarily survey-based and could only draw from a limited source of insight," says Hand. "Newer VOC programs can analyze and act on information from a much wider universe of data sources from several types of feedback, such as solicited, unsolicited, or inferred feedback using operational and transactional data."

Not simply capable of capturing more data, these analytics platforms also unlock better data. They leverage natural language processing, AI and machine-learning to uncover deeper insights, helping companies identify “root causes” and accurately predict customer intent. In turn, they can improve journey design and deliver more personalized service.

"Companies are leveraging advanced speech recognition/transcription software, and state-of-the-art natural language processing (aka NLP) algorithms to extract insights from text using deep learning techniques such as word embeddings, named entity recognition models, and entity resolution models," adds Hand. "These algorithms help organizations uncover what customers are saying about a service or product, their choices, and decision drivers … Mature VOC programs also focus on mining customer insights, in addition to identifying operational opportunities. The framework helps identify quick-win opportunities, including app/website improvements, new member education, and customer retention strategies. Our customer sentiment and complexity framework also highlighted opportunities for product improvements, automation, self-service, and training."

Ultimately, the success of an actionable intelligence program hinges on actually taking action. This process simultaneously involves identifying which aspects of the experience to improve and then putting clear, instructive data in the hands of the relevant stakeholders.

Examples include building customer feedback into agent training and coaching, providing agents with real-time guidance during calls, updating knowledge bases and bots to create more valuable self-service experiences, alerting marketing and sales leaders to customers with the greatest intent to buy, and informing product development teams of real customer reactions to their innovations. Advanced CRM, knowledge management, and customer engagement solutions facilitate this process by improving the accessibility, and relevance, of actionable customer data.

In addition to demanding results from their intelligence initiatives, customer-centric brands also account for the security ramifications. They know that the process of collecting more data from more touch points opens the door to vulnerabilities, and they know that the pandemic has only heightened the risk of fraud.
EMPOWERING AGENTS TO MAKE CONNECTIONS

What happens behind the scenes directly impacts what happens on stage.

"An effortless journey is not one-sided," articulates Hand. "An often-overlooked aspect of customer experience is the employee experience. Consider how the people behind the tools—the agents, data scientists, supervisors, trainers—all come together to create tangible moments."

The key to this initiative is to apply customer-facing transformations inward. For example, it is important to create a seamless, omnichannel agent experience journey. Agents should be able to access different systems, gather actionable data, and support customers from a single, efficient interface. Their training, workflows, and data access should all be tailored to context.

Just as companies are leveraging omnichannel analytics solutions to identify customer pain points and sentiment, they should be leveraging intelligence tools to identify where agents are succeeding and failing. Just as companies are allowing customers to use bots to self-serve, they should be deploying internal virtual assistants that help agents more efficiently lookup records and perform tasks. Customer-centric companies will also leverage AI to identify training gaps, offer micro lessons and simulations, and even provide next-best action recommendations or call sentiment predictions.

“The self-service tools you implement with automation and AI will need to act as a digital companion for your agents,” says Hand. “That means being able to serve up relevant information to them while they are assisting customers (knowledge assistance). Also, leverage automation to eliminate time consuming clicking and data entry. As contact centers grapple over the number of agents that transition back to centers, there needs to be a shoulder for them to lean on, physically or digitally.”

By making remote work the new standard for many organizations, COVID-19 surely threw a wrench into employee experience planning. The steps companies took to elevate the physical contact center experience would not all directly apply to the at-home model.

The digital mindset, however, very much does apply. It not only allows companies to maintain continuity amid the changing work environment but actually turns work-from-home into an opportunity. It helps employees meet or beat productivity goals, while reducing overhead costs and improving the day-to-day work experience.

A digital-centric organization can directly and indirectly confront the potential quality issues of working from home. The direct solution involves using cloud contact center and workforce optimization solutions that provide agents with consistent, seamless, secure access to relevant systems and customer data. The indirect solution involves the increased use of digital engagement channels, which will allow agents to support customers at home -- even if they are working in noisy environments or at unconventional hours.

Digitally minded organizations are also leveraging technology to make remote learning fun, productive, and personalized. Robust customer data helps agents keep tabs on their work even if they cannot engage in face-to-face benchmarking. AI-driven micro lessons can help agents get the training they need even without in-person coaching. Digital learning libraries, meanwhile, help agents grow their skills in an efficient manner -- an opportunity that many do not have in the traditional contact center space. When buoyed with gamification, this technology-driven approach to learning becomes particularly effective.

"Giving associates the freedom to learn at their own pace from different devices can help to keep them engaged and increase information retention," says Hand. "For example, we offer a catalogue of digital courses including gamified content, podcasts, and other digital content that enables associates to control the pace and method in which they learn ... We at TTEC, for example, have an award-winning RealPlay learning platform built on asynchronous learning and presented in a gamified environment. After the pandemic hit, we created a 100% immersive, virtual environment for onboarding and training, with special consideration paid to the unique ways people learn online. Learning programs should be asynchronous and self-paced, featuring practice scenarios in digital sandboxes, followed by personalized coaching and development conducted online."

The same principles apply to the recruiting process. AI and remote collaboration tools can help companies more accurately and efficiently evaluate candidates. And since work-from-home eliminates geographical barriers, these recruiters will have access to a far larger talent pool.
Remote collaboration then helps to keep agents engaged, motivated, and connected to the team, while AI virtual assistants create a more seamless day-to-day experience.

As they enjoy these agent experience benefits, digitally minded companies will experience two other rewards. Their more capable, empowered, productive agents will deliver better experiences for customers. They will also escape the overhead costs and physical limitations of the traditional contact center environment.

THE REWARDS OF SUCCESSFUL TRANSFORMATIONS

Working in partnership with TTEC, leading organizations have successfully adapted their customer contact operations to the world of digital communication and remote work.

Example success stories follows:

**Company: Financial Services Company**

**Challenge:** Due to COVID-19, the company needed to quickly recruit, hire, and train hundreds of full-time employees from a virtual contact center.

**Solution & Result:** We quickly identified remote candidates. The next step was to design a virtual training program that included instructor-led training, online activities, integrated simulations through mock chats, email drafting, and self-paced modules. Additionally, we created a one-stop shop that housed all the necessary materials related to working from home, from equipment set-up materials and IT support details to instructions for adhering to security measures.

We also provided Avaya One-x Softphones that were compatible with the Chromebooks that the client issued to the associates, which allowed calls to be answered through the desktop for added convenience and ease of use.

Within a matter of weeks the recruitment, training, setup, and nesting period were completed (average ramp-ups can take months). The first wave included more than 160 employees against a delivery goal of 150 FTEs, which was quickly followed by a second wave of employees.

The launch was highly successful. Ultimately, more than 200 net-new employees were deployed and ready to assist customers. They achieved a 94% CSAT and a 445 AHT, beating a goal of 457 AHT.

**Company: Retail/e-Commerce Company**

**Challenge:** Client needed to quickly expand its customer support, including monitoring transactions for fraudulent activities + expertise to remotely train on critical trust and safety protocols during COVID-19.

**Solution & Result:** We immediately activated a plan to train 170 team members on critical trust and safety issues in a virtual contact center environment amidst a country-wide lockdown in India.

We quickly identified training, operations, and quality assurance candidates and engaged our global training network in the Philippines which included certified trainers who would spearhead the WFH training initiative. After delivering the necessary equipment and IT assets to the team members’ homes, we collaborated with the client on identifying specific topics for a customized virtual training program.

To further expedite the program, we ran 4 parallel virtual batches which were monitored and observed by program-certified training and operations leaders to assess training efficacy.

All training batches went live as scheduled and we succeeded in ramping up to 170 team members in 40 days during the lockdown. The team members remained enthusiastic throughout the process and some even volunteered for additional practice sessions. In fact, remote training throughput came in at 91% compared to 88% in a brick-and-mortar contact center.
A good customer experience is no longer a point of differentiation. It is no longer a reason for celebration. With 66% of consumers saying they will consider a competitor after just one or two bad interactions, a solid experience is simply a requirement for today’s companies.

This new reality does not mean companies cannot differentiate based on the experience. It simply means that the standards for a valuable experience are far higher. It takes more to reposition a brand from one that supports customers into one that connects with them.

Attaining this higher standard need not, however, be an insurmountable burden for companies. Thanks to a combination of innovative best practices and powerful technology, it is possible to quickly and efficiently elevate the customer experience.

The transformation generally hinges on two core principles: the value of a customer-centric mindset and the power of cloud technology.

“While the tools have been in place to solve these issues for a number of years, they have been costly, complex to implement, and costly to manage,” explains John Finch, AVP of Product Marketing at RingCentral. “Cloud-based technologies today enable innovative businesses to turn pre-existing customer service models on their head.”

This briefing will help you create a more valuable and customer-centric experience. It details some simple steps for building an experience that empowers rather than burdens your agents and customers.
And insofar as 59% of consumers are more prominently considering the customer experience when making purchasing and loyalty decisions in the post-COVID world, these steps are as fruitful as they are simple.

**UNIFYING THE CUSTOMER CONTACT OPERATION**

Ask any functional business leader about their biggest challenges, and you will likely hear about operational silos. Direct that question to customer contact leaders, and you will encounter particular frustration with misaligned strategies, systems, and processes.

Over the past few years, CCW Digital research has revealed that the majority of contact centers lack a 360-degree view of their companies. It has shared that most companies require agents to view multiple screens when supporting customers. It has confirmed that few agents receive meaningful context as customers escalate from other channels. It has identified repetitive questioning as one of the most enduring customer experience pain points.

"On average, an agent needs 5 different tools and data sources to answer a question or solve a problem," adds Finch.

Collectively, these challenges impose additional effort on customers, adversely affect agent productivity and happiness, and ultimately create costly inefficiencies for the business. And the direct effect on interactions says nothing about the longer-term ramifications on areas such as gathering customer intelligence or optimizing customer journeys and business processes.

Each challenge is, of course, the direct consequence of disconnected systems and business units. When all channels, databases, and enterprise tools are not connected, let alone built into a singular platform, delivering a seamless, frictionless, omnichannel experience is impossible.

The road to a new caliber of customer centricity, therefore, begins with fully unifying the contact center operation. This includes adopting a cloud-based platform that centralizes the CRM, all engagement tools, workforce management systems, and analytics solutions.

"Integrated UCaaS and CCaaS platforms are key to breaking down silos between the contact center and the rest of the business," says Finch. "With the right tools, managers can coordinate and maintain a community that bridges management, agents, and customers together on a single platform that improves interaction quality, makes scheduling easy, and guarantees customer inquiries are always addressed."

Such a unified platform supports the introduction of an omnichannel experience. Customers will be able to communicate in their channels of choice, while moving seamlessly between touch points depending on context. No matter where they choose to interact or how they move about the journey, employees will have a 360-degree view of their behaviors, intentions, and interactions. They will also have the ability to seamlessly support them at all touch points, reducing handle times and increasing personalization.

To put it simply, these abilities create the kind of experience that yields differentiation.

Although a modern contact center platform plays a pivotal role in the unification process, it is equally important to focus on cross-team (and cross-functional) collaboration. The customer experience is the product of many different departments, and the knowledge to best make decisions and serve customers is similarly dispersed throughout the company. By building a culture of collaboration - and of course having the tools to connect them - the company ensures every decision positively impacts the customer experience.

**UNLOCKING ACTIONABLE INTELLIGENCE**

Unifying the contact center operation is important, but it will not alone yield a better customer experience. Success requires companies to leverage their modern contact center platform.

Unlocking actionable intelligence makes for one of the most valuable opportunities. When all channels and systems are connected, companies can deploy omnichannel analytics solutions to capture intelligence at scale. Instead of relying on limited survey feedback from select customers in specific channels, the company can instantly analyze every interaction across the entire journey.
Not simply capable of looking across these interactions, the new generation of cloud-based, AI-driven analytics solutions can dive deeper into these conversations. As a result, they arm companies with unparalleled insight into customer intentions, journey pain points, root causes of behaviors and sentiments, opportunities for proactive engagement, and optimal moments for upsells. The company, in turn, has a vivid window into all possible areas of improvement - both for specific customer interactions and for the experience journey at large.

This prescriptive intelligence only becomes actionable, however, when the company empowers stakeholders to make decisions based on the data. Unified platforms assist with this cause too, putting relevant insights from the call queue, CRM, and knowledge base directly on the agent’s screen exactly when necessary. Newer AI tools take the process one step further by advising agents on next best actions and/or predicting the impact these actions will have on sentiment.

Thanks to this intelligence, the company will have clearer knowledge of customers. This knowledge will reduce pain points like long wait times, silence periods, and repetitive questions.

“Knowing your customers is key,” declares Finch. “Can you identify them across different channels and social identities? Can you see the history of their full interactions across those different channels and identities? Do you know if they are a platinum customer? Do you know if there is a pending event with them (A payment coming due, or a full shopping cart, or a flight tomorrow).”

More importantly, the agent -- or AI-powered bot or routing mechanism -- will be able to make the best possible decision in the shortest possible amount of time.

“No employee is a single source of truth for an entire business,” says Finch. “By giving agents access to experts of teams across the company through team messaging, video conferencing, and a shared corporate directory, they can get the assistance they need to answer customer’s questions on the first interaction. The ability for agents to be in contact with each other and to be able to reach out to experts through some sort of collaboration tool can help reduce the isolation and get faster answers to the hard questions. Even the daily huddle at the beginning of a shift can be recreated with a video meeting to reduce any sense of isolation and to help build up a strong feeling of team.”

EMBRACING THE REMOTE WORK OPPORTUNITY

With the possible exception of “the customer is always right,” no customer contact cliche is more popular than “happy agents equal happy customers.” Indeed, improving the agent experience has long represented a top priority for customer-centric organizations.

By forcing companies to urgently adopt a work-from-home model, COVID-19 exacerbated the agent experience challenge. Companies did not simply have to remove barriers to successful performance inside the contact center -- they had to empower agents to perform from across distributed locations. And insofar as 73% of companies plan to make work-from-home a permanent option even after the pandemic subsides, the importance of addressing remote work challenges cannot be overstated.

The earlier steps of connecting contact center tools, building a culture of collaboration, and unlocking actionable data will play a pivotal role in improving the remote agent experience.
Customer-centric companies can amplify the impact by introducing modern workforce management tools and rethinking the workflow dynamic. Modern supervisor tools, such as call monitoring, co-browsing and whispering, help managers support agents even when they are separated physically. Real-time collaboration and AI-driven training tools can reproduce the learning and benchmarking process outside the traditional office environment.

It is also important to renew a commitment to quality monitoring. In addition to addressing ongoing concerns about call accuracy and consistency, the company will need to ensure remote agents are capable of delivering stellar support in the customer’s channel of choice. As the Consumer Preferences Survey confirms, about half of customers will hold poor-quality phone experiences against the brand.

As they embrace the work-from-home era, leading companies will additionally redefine the role of the supervisor. In addition to typical performance management and training duties, this leader will play a role in mentoring and engaging remote agents to boost morale, achieve buy-in, and cultivate a valuable culture.

Not simply fixated on overcoming work-from-home challenges, successful companies will embrace the opportunities. They will recognize the advantages of a distributed work environment, including contingency planning, the ability to support more hours and volume, and the opportunity to expand the talent pool. Each yields a more customer-centric team.

“Several months into this new normal, it’s clear that many employees are performing as well or better than they were before,” summarizes Finch. “Recruiting remotely gives organizations the ability to find the best customer service talent, regardless of agent location, and reversely gives agents the opportunity to seek roles at well-paying, reputable organizations and consequently a better quality of life even when they’re located in more remote areas outside of large city centers.”

INTRODUCING CUSTOMER-CENTRIC ENHANCEMENTS

The aforementioned steps will result in a higher-quality team of agents, who have more efficient systems, and more actionable context for each interaction. They will markedly elevate the customer experience.

A company can go one step further, however, by implementing an array of customer-centric enhancements.

Callback technology represents one of the most notable improvements. As the Consumer Preferences Survey reveals, a whopping 53% would be more satisfied with a brand if they had the ability to request a callback at a convenient time. Not simply a welcome gesture, a callback solution improves operational performance and improves inbound and outbound routing. The smaller call queue increases agent availability, allowing the company to more consistently route customers to the best agent for their issue. And with preemptive knowledge about which customers are requesting a callback, the company can ensure the outbound caller is the right agent for the job.

“Callback solutions decrease time that customers have to spend waiting on the phone for their inquiries to be resolved, improving their overall satisfaction and driving down overall cost,” declares Finch.

The same concept applies to asynchronous messaging support. Messaging ensures the support experience happens on the customer’s terms, reducing effort, increasing convenience, and ultimately boosting satisfaction.

Other beneficial opportunities include the offering of proactive care and the introduction of multimedia digital support options, such as video chat or co-browsing.
SUPERIOR EXPERIENCES ARE ATTAINABLE & IMPACTFUL

The aforementioned steps promise a straightforward path to a more agile, customer-centric, and agent-friendly customer contact function.

Not simply theoretically promising, the pathway works in practice. By partnering with RingCentral, leading companies have simultaneously scaled and improved their experiences, creating joint efficiency and efficacy benefits.

Example success stories follows:

**Company:** Brightway Insurance Jacksonville Fla

**Challenge:** Did not have reporting to show they needed to hire more agents.

**Solution & Result**

Switched to RingCentral Contact Center: found that calls were stalling at agents who did not have the answer that was needed and could not get the answer - by improving routing & internal comms they ended up needing to hire many fewer agents than traditional metrics would imply.

Expanded across the country - planned to open a second contact center in the west for better expertise on the subtleties of western state insurance law. Before the CC was built they started adding Work from Home agents in the interim. They quickly realized that WFH agents worked well for them and never needed to open the second datacenter - for regions beyond Florida they just hire within that region or state.

Use Collaboration Tools (Team messaging, video meetings) to foster a sense of team within the organization, agents can find agents from another state to provide answers to hard questions significantly increasing first contact resolution.

Savings - in the millions of dollars, hired many fewer agents (but agents with a great deal of very specific expertise) and did not need to build the second contact center.

**Company:** ENGIE is a French multinational electric utility company

**Challenge:** Wanted to switch to digital customer service - were providing poor and inconsistent service because of the variety of tools that they were forced to use to support different channels. Agent training and ramp up time was very slow and the customer experience was poor.

**Solution & Result**

- Switched to Engage Digital and now have 6,000 agents using the platform. Support interactions on Facebook / Twitter / Apple Business Chat / SMS / Live Chat / Email and from the Engie mobile app. The system is integrated with a back end CRM system and they have AI driven chatbots to initiate most customer conversations.
- They have over 6,000 agents on the platform.
- Training for a new agent is complete in under two hours - without the need for incremental training for support on additional digital channels.
- Their average response time was cut in half.
BUILDING JOURNEYS FOR CUSTOMERS WHO WANT IT ALL

They view fast, accurate interactions as the cornerstone of a great experience. They continue to cite long wait times, frequent transfers, and repetitive questions as major pain points. They seek intuitive, efficient interactions in digital channels yet demand seamless escalation to the voice channel. They value transparent, proactive communication from agents who know who they are and what they want.

Customers, as the 2020 Consumer Preferences Survey reveals, want it all.

“If it’s not good enough to just have better CX than competitors,” adds Dave Bukovinsky, executive director, product management at CSG. “Customers expect all experiences to be similar to the best experiences they have had with other companies, across industries.”

Successful companies will embrace this challenge and deliver stellar experiences, regardless of when or where the customer is connecting.

If they succeed, the rewards will be immense. In the wake of COVID-19, 60% of consumers say they are more likely to become more supportive of brands that deliver great experiences.

If they do not, the costs will be significant. Nearly 66% of consumers will consider switching to a competitor after just one or two bad experiences; an additional 22% will look elsewhere after a third strike.

Granted, understanding the value of a great experience and knowing how to execute are two vastly different things. On the surface, the idea of meeting the concurrent demand for speed, accuracy, personalization, and proactivity may seem daunting.

It does not, however, have to be an impossible burden. By focusing on these objectives, you can quickly and successfully build a journey capable of supporting customers who want it all.
EMBRACE DIGITAL ENGAGEMENT WITHOUT COMPROMISE

The digital transformation is not an optional endeavor. It is the centerpiece of today’s customer engagement landscape.

In the wake of COVID-19, the majority of customers have changed their buying habits. The Consumer Preferences Survey reveals that today’s consumers are scaling back their brick-and-mortar purchases in favor of online shopping. When they do visit physical stores, it will increasingly be for picking up online purchases rather than random browsing.

Not simply leveraging online media for shopping, today’s consumers are also demanding better digital support experiences in the post-COVID world.

“Customers are looking for digital experiences that are easy, frictionless, and seamless,” says Bukovinsky. “Digital support also needs to save time, be faster, and be more convenient than the non-digital alternative.”

To achieve this caliber of interaction, it is imperative to view digital experiences through customers’ eyes. It is vital to consider how customers seek information, make purchases, or request support via online channels and then design experiences accordingly.

In some cases, this means containing an interaction within a given channel. A customer who buys food via a delivery app, for instance, should not have to call to make changes to the order. In others, it means supporting omnichannel interactions that best account for context and customer intent. A customer who purchases a product from an online retailer may still prefer to make returns or receive technical support at a nearby brick-and-mortar location.

In all cases, it means prioritizing convenience and efficiency. The availability of new channel options should provide customers with more flexibility — not more friction — in getting the experience they want at any given moment.

“Seeing the tremendous spikes in contact volumes, executives are starting to accept this new reality: the customer will contact you where they want to contact you,” says Bukovinsky. “Before, contact centers were trying to use call technology to channel-shift people—for example, using messaging like, ‘for faster service, please try our website.’ Today business leaders are realizing customers are going to use any channel available to them, so companies must make service easier everywhere.”

Companies can provide convenient, efficient experiences everywhere with technologies like conversational AI, which does so at scale. Capable of recognizing customer intent and adapting to natural conversation flows, conversational AI-driven platforms turn self-service from a notoriously static, useless concept into a legitimate, personalized resolution option for many customer issues. And insofar as it is channel-agnostic, conversational AI can elevate experiences in chatbot, messaging bot, and even IVR platforms.

And in the event that customers do hit a dead-end, these AI-driven platforms have at least captured valuable information that can be directly fed to the agent (whether in a digital or voice channel) to minimize friction, maximize personalization, and improve the likelihood of a successful resolution.

“IVR call trees and primitive FAQ-driven chatbots have become obsolete as conversational AI (CAI) technology has matured,” explains Bukovinsky. “CAI’s applications in voice, chat and SMS can provide a quicker resolution time, more personalization, reduced costs, and a better experience for the customer.”

ELIMINATE SILOS TO UNCOVER ACTIONABLE INTELLIGENCE

“Companies need to understand their customers better” declares Bukovinsky. “To achieve that combination, a company needs the ability to produce recommendations in real time, based on analytics covering all data points on a customer to pick up on shifts and anticipate what the customer needs now.”

By introducing more engagement touch points, the digital transformation theoretically provides access to this caliber of intelligence. Companies can gain a virtually endless array of data about who customers are, what they want, and how they feel about the journey.

If, that is, they overcome one of the most enduring customer contact challenges: operational silos. If channels are not connected, systems are not aligned, and teams are not collaborating, companies cannot seize this opportunity. They can neither look across the journey to gain the most actionable intelligence nor empower different stakeholders to leverage the insights in all conceivable moments of truth.

Unifying the customer experience is, therefore, the key to cultivating actionable intelligence.
THERE ARE FOUR PHASES TO THIS UNIFICATION PROCESS:

1. **The first step involves adopting an omnichannel engagement platform.** By empowering customers to interact in their channels of choice and move between touch points, companies will get a more robust, more accurate sense of customer intent, behavior, and sentiment throughout the journey.

2. **As they unify their experience on the frontend, it is important for companies to simultaneously align channels on the backend.** It takes a 360-degree view of the experience to not only recognize customers but learn exactly how they are interacting and identify the biggest pain points and improvement areas throughout their journeys.

3. **After achieving this alignment, leading companies will leverage advanced, AI-driven analytics solutions to uncover valuable insights at scale.** Able to instantly gain insights from all interactions, these solutions will simultaneously help companies better understand individual customers and the experience at large. Not simply adept at identifying problems, leading tools recommend the best possible actions and predict friction points in the customer experience.

4. **The final phase involves creating a mechanism for taking action based on the data.** This hinges on attaining buy-in from all key stakeholders (they need to know why acting on the data is beneficial) and then ensuring they have real-time access to data and tools that can inform decisions and drive actions. Whether in the form of “next-best action” guidance for frontline agents, journey mapping insights for experience leaders, or business intelligence for executive teams, the answers to key problems are never more than a few clicks away.

“Companies should equip agents to anticipate customer needs and determine the “next-best action” in real time,” advises Bukovinsky. “This is aligned to removing a multi-tier support structure so that the call center can move towards a single-touch resolution.”

PROACTIVELY ORCHESTRATE CUSTOMER JOURNEYS

Efforts to expand digital capabilities, unify touch points, and uncover actionable intelligence are for naught if the company does not parlay these advantages into better customer journeys.

With fewer than 10% of companies reporting success when it comes to journey orchestration, it is clear the overwhelming majority of companies are missing opportunities. They are not creating faster, more personalized, more seamless interactions for customers at a time when the experience is more important than ever.

Thanks to advances in AI and analytics technology, companies can distance themselves from this lagging pack. They can adapt journeys to the specific needs of their customers.

By gaining insight into customer intent and root causes behind sentiment, companies can identify and alleviate overarching sources of frustration and inefficiency. If customers typically spend 3 minutes on the website searching for a customer support phone number, the company recognizes the importance of redesigning the site or “popping up” key support information on certain pages. If customers routinely struggle to resolve a billing dispute in the chatbot, the company knows to either reprogram the bot — or more quickly escalate customers to another channel. If a cable company’s call volume routinely surges at the first sign of an outage, the company understands the value in delivering proactive alerts ahead of scheduled maintenance.

Not content with merely rebuilding aggregate journeys, customer-centric companies will also also use predictive analytics to make real-time improvements to individual conversations. If a customer seems to be developing negative sentiment while discussing a return, systems will provide agents with “next-best action” guidance — such as changing tone, offering compensation, or escalating to a specialist.

They also implement processes for learning and dynamically adapting to customer preferences and profiles, such as taking them to specific screens on the digital app, providing support in their native language, presenting relevant offers, or immediately routing their support calls to experts who know about the product they own. This ensures a heightened sense of “recognition” and “personalization,” even in theoretically low-touch digital environments.
“To reach heightened CX standards, companies are analyzing multiple sources of data to create personalized interactions and deploying journey orchestration and AI to automate the process,” remarks Bukovinsky.

RETHINK CUSTOMER EXPERIENCE METRICS

When it comes to the business world, numbers conquer all. Leaders can deliver rhetoric about the concept of customer centricity, but CX teams will ultimately tether their efforts to visible key performance indicators.

Meaningfully improving the customer experience, therefore, requires the adoption of customer-centric metrics. These metrics communicate the inherent value of customer centricity, thereby ensuring conversations, process designs, and technology purchases are all made with the customer in mind.

“Within the contact center, companies have traditionally focused on using agent interactions to drive sales, reducing CX to a lower priority,” explains Bukovinsky. “We’re seeing those priorities shift as CX becomes the dominant factor that determines brand loyalty. Agent interactions should be focused on the reason customers reach out. It is best to serve their immediate needs and avoid turning the call into a sales pitch.”

Contrary to common misconception, a customer-centric approach to performance measurement does not necessarily involve downplaying efficiency. Customers value convenience above deep personalization, which means companies have every incentive to deliver quick, concise interactions. They also have every incentive to forego conversations — and emphasize self-service — when appropriate.

The key, however, is taking the right-minded approach to efficiency. Instead of looking purely at internal operational factors, such as average handle time or call count, they consider whether the experience is saving time and adding value for the customer. Metrics like first contact resolution, effort score, and self-service utilization communicate this more customer-centric approach to efficiency.

“Companies are shifting away from average handle time as their north star metric and toward first-call resolution to ensure the agent is focused on the customer experience,” adds Bukovinsky.

PROOF OF SUCCESS: HOW COMPANIES ARE WOWING DIFFERENT CUSTOMERS — WITH DIFFERENT DEMANDS

Different companies have different objectives for their customer experience function. They are also at unique phases of their digital transformations. Most importantly, they serve distinct customer bases.

All, however, share in the goal of wanting to elevate all facets of their customer experiences. They want to build journeys that are digital-friendly, seamless, predictive, and personalized.

The aforementioned four steps help companies account for both realities. They do not marry companies to a specific experience but instead provide the freedom to adapt to what their customers want right now — and then transform as customer profiles, demands, and behaviors change in the future. A brand that sets customer-centric metrics, leverages AI to create better digital experiences, eliminates silos to uncover customer data, and then orchestrates journeys based on that data will always be able to adapt. It will always be able to improve.

By partnering with CSG to implement the aforementioned steps, numerous companies have reaped the rewards of this added flexibility. Whether through their response to COVID-19, the elevation of their IVR experiences, or their newfound digital capabilities, these companies have in turn achieved demonstrable business results.
Example success stories follow:

**Company: Top 5 Bank**

**Challenge:** The bank is focused on digital customer engagements as a key strategy and wanted to modernize its manually intensive process for mortgage notifications to improve CX and achieve efficiencies.

**Solution & Result:** Deployed CSG Journey Orchestration (plus print and email comms) to streamline and automate its three paid-in-full mortgage notification types.
- Reduced manual effort and number of vendors
- Shortened timelines for customer communication
- Increased digital delivery by 10% and enhanced digital customer experience (CX)
- Email open rate of 66%; reduction in paper costs
- Additional scale and flexibility utilizing the solution’s cloud-based architecture

**Company: State labor department**

**Challenge:** One state’s Department of Labor saw massive increases in inbound call volume due to job losses during the COVID-19 pandemic, going from fewer than 1,000 to more than 1.5 million calls per day.

The state needed a solution that would relieve pressure on its overwhelmed phone circuits, allowing its citizens to get the information they needed about their unemployment applications.

**Solution & Result:** Implemented IVR with CSG
- Processed more than 1.6 million calls in one day
- The system scaled to handle 70% of the traffic

**Company: Regional cable/broadband provider**

**Challenge:** This regional cable/broadband had a goal of improving customer experience and increasing call containment with a more intuitive IVR to help customers self-serve.

**Solution & Result:** Implemented inbound IVR with more than 800 predictive prompts and 40+ call flows
- 55% of account mgmt-related calls contained
- 53% of appointment mgmt calls contained
- 50% of payment-related calls contained
- Achieved containment goals in first 60 days
4 SIGNS YOU’RE READY FOR CUSTOMER CENTRICITY
YOUR GUIDE TO CREATING AN ORGANIZATION THAT IS FLEXIBLE ENOUGH TO BE CUSTOMER-CENTRIC

Long wait times. Multiple transfers. Trouble finding the right channel. Ineffective IVRs and self-service platforms. Repetitive questions.

As CCW Digital’s Consumer Preferences Survey reveals, these infamous pain points continue to weaken customer experiences. And insofar as 65% of consumers consider switching to competitors after just 1-2 bad experiences, these challenges are persistent threats to the bottom line.

What causes these challenges to linger? What prevents companies, the same ones that profess a resounding commitment to customer-centricity, from optimizing experiences?

The answer is simple: a lack of flexibility.

The typical customer contact team is unable to quickly adapt to overarching trends in the marketplace, as well as specific customer and employee nuances. As a result, they routinely struggle to efficiently respond to customer needs, let alone proactively resolve them. This struggle manifests as effort-intensive challenges like repetitive questioning, extended wait times, and an inability to engage with customers in their channels of choice.

By dramatically impacting customer sentiment, interaction volume, and the physical agent work environment, the recent COVID-19 pandemic illuminated this flexibility challenge. If companies could not adapt to long-term, well-documented trends like omnichannel and personalized engagement, what chance did they have of responding to such a sudden, massive shift?

“Most business verticals have experienced a steep rise in demand for increased customer engagements and for employees to work from home, and many of them have been unprepared,” says Tony Pereira, SVP Enterprise Solutions Strategy at Mavenir. “Many organizations whose entire business depends on customer service have been limited by the rigidity of their solutions, unable to adapt to the change in demand quickly. Others, for whom customer service is only a part of their business, have been overwhelmed with huge volumes of traffic and increased wait times for customers.”
The few that succeeded, however, relied on their perpetual commitment to flexibility and continuity planning. By calibrating their operation around customer centricity, not a static set of antiquated processes or systems, they were able to quickly and successfully adapt to newfound customer and agent needs.

By revealing the commonalities between these successful companies, along with two real-life case studies, this briefing will assess whether your organization is flexible enough to be customer-centric.

**YOUR AGENTS CAN RECOGNIZE YOUR CUSTOMERS**

Long wait times continue to frustrate customers. The real kicker, of course, is that so much of the time spent after reaching an agent is being wasted on the lowest-value aspects of the experience.

In general, agents are not spending countless hours on the “problem solving” portion of the conversation. They are instead focusing intently on gathering basic information about customers. They are asking repetitive questions about the customer’s identity, status with the brand, issue, and desired resolution.

This process greatly frustrates customers, who expect a brand to know them or at least have access to what they shared in another channel five minutes earlier.

“For a customer, few things are as frustrating as having to continually repeat their name, account number, and other relevant information,” explains Pereira.

Not simply a “bad look,” the cumbersome qualification process also weakens the overall experience. If agents are not armed with actionable insight about particular customers’ profiles, interaction histories, and intentions, they are unlikely to deliver contextually relevant solutions or information. They are certainly unable to anticipate and proactively solve customer needs.

The time employees waste on repetitious qualification tasks, moreover, is time they cannot spend supporting other customers. This is always a problematic inefficiency, and it can create a particularly massive bottleneck during times of surging volume or evolving customer needs.

“Customers do not like to wait,” summarizes Pereira. “Even if businesses offer 10 different channels, that does not help the customer experience if it takes 15 minutes to speak to someone. Businesses need tools that can minimize wait times.”

The first step toward minimizing wait times, and maximizing customer contact flexibility, therefore involves arming agents with actionable data about individual customers. This intelligence will allow them to skip ahead to the valuable part of each conversation, increasing the quality of their support and their availability for future calls. A cornerstone of this process involves seamless integration between the CRM system, the knowledge base, and contact center or customer experience platforms.

“Successful customer experience is when the business knows all the necessary information about the customer and can anticipate their needs over the interaction,” declares Pereira. “This requires Contact Centers to have the ability to easily integrate with CRM systems and provide access to detailed records on the performance of their agents.”

Leading companies are then layering these tools with robust analytics and AI, which can dive deeper into customer sentiment and intent and arm agents with the next best action guidance.

**YOU’RE INTELLIGENT ABOUT ROUTING AND QUEUE MANAGEMENT**

Empowering employees with actionable data about each customer will markedly improve the quality and efficiency of their care. It will render them more capable of delivering proactive support and more available to address unexpected needs and volume.

It is not, however, the only vital step for improving a customer experience team’s flexibility.

Intelligent routing and queue management can also play a pivotal role.

Thanks to a combination of powerful analytics and modern routing platforms, companies can account for factors like issue urgency, channel preference, expertise level, customer lifetime value, and even personality when routing customers to the right agent (or bot) for their issue.
Some companies, moreover, will choose to route customers to the same agent each time - leading to more empathetic, personalized conversations.

“Routing customers to the same representative (if available) could make difficult situations less stressful,” explains Pereira. “Having a familiar voice on the line each time could enable a lasting connection between the customer and the business. It could also remove the irritation of providing the same information over and over.”

Regardless of the specific routing strategy, the point is that it will reduce friction and increase value throughout the entire experience. Customers will get to the right destination – quickly.

And since these rules can be consistently adapted based on customer or operational needs, intelligent routing helps companies always provide the best possible customer journey. With these advantages, it should come as no surprise that companies ranked “intelligent routing” as their #1 contact center ambition in CCW Digital's Market Study on the Contact Center of 2025.

To amplify the benefits, leading companies are also implementing technologies and processes that optimize the experience at all phases of the journey.

“[This includes] intelligent systems that can anticipate long wait times and provide other options – enabling automatic callback, offering a text-based self-service alternative for problem resolution, even routing calls to less busy queues,” says Pereira.

These efforts are certainly fruitful – as the Consumer Preferences survey reveals, 53% of customers would be “more satisfied” with a brand if they had a callback option. Nearly 45% say the same of texting, making these two of the top customer experience enhancements.

YOU'RE SERIOUS ABOUT OMNICHANNEL

Different customers prefer to engage in different environments. All customers, meanwhile, want to receive an answer as quickly and conveniently as possible.

Collectively, these two realities underscore the importance of making a legitimate commitment to omnichannel.

There are three major facets to an omnichannel experience. First and foremost, it requires a contact center or customer experience framework that allows agents to connect with customers at all touchpoints. No matter where the interaction is happening the agent should be able to support the customer with the same tools and have access to the same 360-degree data.

Omnichannel also requires the ability to deliver meaningful engagement in all channels. This does not necessarily mean that all channels require 24/7 access to agents – or that all channels need to be a perfect option for all conceivable issues. It does, however, mean that each channel should be a legitimate engagement option for a customer – not just a hub for outbound communication or a “waiting room” that automatically sends customers to the phone.

“Customer expectations have evolved from when contact centers came about,” says Pereira. “If a customer reaches a business on a specific channel (such as a text message), they expect the interaction to happen on that channel. Many companies, however, will only support voice channels or will send customers to a phone number for most interactions.”

Additionally, omnichannel requires seamlessness on the frontend. Although it is important to support customers in their preferred environment, customers will inevitably choose to move between channels at different times or for different issues. This process should never require undue effort. It should never suggest that the different channels are run as different, fragmented business units.

Upon creating an omnichannel experience, the company will be better able to connect with customers on their own terms. It will also establish more flexibility in the face of crises (or any volume and resource changes), as the entire experience will not be reliant on availability within one given channel.

Connectivity between channels also helps companies better gather insights and orchestrate journeys. Beyond empowering agents to “say the right thing” in the moment, the unity also opens the door to automation and self-service. Companies can accurately identify the biggest points of inefficiency and frustration and then use bots or IVRs to address them in a customer-centric way.

As the Consumer Preferences Survey reveals, 86% of customers are open to self-service when it is used effectively. Omnichannel companies can make the most of this opportunity.
“Similar to the lack of additional channels, businesses have struggled with automation,” explains Pereira. “There is no reason a customer should have to talk to a live agent to get order status from a company or to check with their bank if a check has cleared. Having systems implementing IVR and API capabilities for self-service could significantly increase customer satisfaction, decrease wait times, and optimize agent use.”

YOU’RE EMPOWERING REMOTE AGENTS

The recipe for agent empowerment has typically included great training, unified contact center platforms, and 360-degree customer views. Recently, it grew to include AI-driven insights and recommendations.

In the wake of COVID-19, leading companies recognized the need for another ingredient: accommodation of remote work.

With more than 80% of companies adopting work-from-home in the face of COVID-19 and 73% planning to make it a permanent option, remote work is a new normal in the customer contact landscape. It is how agents will contribute to their teams — and support customers.

This transition is the ultimate test of flexibility, as agents will be working in diverse environments, with unpredictable (and sometimes insurmountable) technology and logistics challenges. Companies will need to swiftly adapt to these realities to ensure strong performance.

One step involves leveraging cloud technology to ensure steady, secure access to key customer contact systems. They will also want to develop a protocol for establishing and auditing connection standards, as some agents may not have the connectivity required to access systems or engage in high-quality phone conversations.

“There can be logistical challenges,” explains Pereira. “What if the employee lives in an area that provides limited network bandwidth? What about employees that are at home sharing their Internet connection with their family? Even though they can access customer calls, does the customer experience suffer due to poor audio quality?”

These scenarios would be problematic; as the Consumer Preferences Survey confirms, the majority of consumers would hold poor at-home phone experiences against the brand.

Additional fixes include emphasizing the aforementioned transition to omnichannel, which would allow at-home agents to support customers via text when a phone call is not the ideal option. Allowing employees to securely access key data and systems from mobile devices would give them more flexibility for overcoming system and office space issues.

“A solution that can allow calls to be routed to a separate audio device but still keep the interaction anchored in the system can eliminate these issues,” says Pereira. “It provides the flexibility employees need, it can help with audio quality to not dampen the experience, and it can continue to provide businesses with the level of monitoring and reporting they need to ensure an excellent customer experience.”

FLEXIBILITY IN PRACTICE

Not theoretical nice-to-haves, the aforementioned four qualities are key drivers behind some of the most flexible, customer-centric operations.

Some particularly successful companies have worked with Mavenir to introduce solutions and initiatives that simultaneously amplify their operational agility and improve customer experiences.
Example success stories follows:

**Company: A US-based financial services company**

**Challenge:** Allow customers to reach assigned representatives regardless of location while tracking all calls with the business’s CRM

**Solution & Result**
- Implemented custom routing rules to directly connect customers to their designated service representative, whether they were in the office or away
- Routed all calls through Zoho CRM for improved tracking and follow-up
- Reused existing voice interconnection infrastructure to minimize the total cost of ownership of the new solution

**Company: A US-based delivery restaurant**

**Challenge:** Increase system stability, improve response time for orders, enable self-configuration for each location, and enhance worker flexibility

**Solution & Result**
- Implemented a reliable, high availability solution
- Increased call answer rate by order takers to 99%
- Increased calls handled per store by 93%
- Increased average order taker utilization to 90%
- Decreased call wrap-up time by 67%
- Transitioned to self-managed IVR flows after 2 months
- Seamless transition for remote order takers
THREE STEPS TO PERSONALIZING THE CUSTOMER EXPERIENCE

If you’re asking what defines a great customer experience, you’re focusing on the wrong question. The more relevant question is who defines a great customer experience, and the answer is rather simple: your customers.

In today’s landscape, it is imperative to tailor experiences to customers’ specific needs, wants, behaviors, and sentiments. It is essential to recognize personalization as the key to a great customer experience and thus the driving force behind business growth.

Personalization, in this context, does not necessarily mean attempting to impress customers with everything you could conceivably know about them. It does not mean engaging every single customer in lengthy conversations about pets, college degrees, and vacation plans. After all, the Market Study reveals that this form of personalization ranks very low on the typical consumer’s priority list. Speed, meanwhile, ranks as a top demand.

Instead, the goal is to recognize customers, as well as their preferences and issues, and then deliver an experience appropriate for that context.

“It’s best to define a great customer experience as an engagement that delivers service in a manner that is consistent with the customer’s expectations, through a channel they are comfortable using, and delivers the right outcome,” says Craig Wilson, Senior Principal Business Consultant of Genesys. “And, let me add one more element to this. It’s only a great customer experience if you aren’t forcing the customer to repeat themselves.”

This “productive” approach to personalization yields the fast, frictionless, accurate, resolute experiences that customers value above all else — wherever or whenever they choose to connect. It also coincides with a better experience with agents, who will have all the insights they need to provide fast, harmonious service and support.

Best of all, it is attainable using a collection of modern technology and strategy. This briefing reveals three steps you can take to deliver a personalized experience for your customers.
STEP 1: RECOGNIZING YOUR CUSTOMERS

In your everyday life, you do not approach all conversations with a blank slate. You do not assume everyone with whom you speak is a stranger who could want to talk about anything under the sun.

Instead, you use your recognition of each person -- and potentially your ability to decipher context -- to set expectations for the conversation and help formulate your responses.

“Imagine, if you will, you are walking down the street, and you see both your mother, and then the person you owe $50 to,” illustrates Wilson. “You are primed to engage each of them differently. You know something, and you use that information to set up how you respond.”

This same concept applies to personalizing customer experiences. Customer-centric companies recognize their customers (and relevant information about those customers), and then use the knowledge to design the best possible journeys and engage in the most resonant possible conversations. The road to personalization, therefore, begins with collecting actionable customer data.

There are several keys to acquiring this intelligence. First and foremost, it is crucial to define what customer centricity (and, by extension, customer recognition) even means within your company and/or industry. How do your specific customers engage? What role do specific insights and personas play in shaping and optimizing that engagement?

“Customer centricity means two entirely different things in fashion and auto insurance, for example,” explains Wilson. “Often, it’s important to create different profiles for distinct customer segments. This, naturally leads into what, and why, as in what do we offer them, and why would they choose us over other providers?”

After identifying the type of data that will impact your experience, the next phase is to build an environment that can successfully gather the necessary intelligence. This effort, notably, requires total alignment between contact channels and enterprise systems -- even those that fall outside the auspices of the traditional contact center. If you cannot look across every conceivable touch point, you cannot possibly gain the most comprehensive, accurate view of customer profiles, demands, feelings, and behaviors.

It is subsequently important to implement customer intelligence platforms that take advantage of the unified environment. The ideal platform will generally include three components: a robust CRM solution that captures meaningful data about each customer, a “voice of the customer” solution that gathers direct feedback from specific customers, and an omnichannel analytics solution that uncovers data from all interactions. By harmonizing these solutions and then using AI-driven analytics technology, you will gather insight into customer intent, sentiment root causes, and common pain points. You will learn all the relevant details about a given customer -- and the type of journey that will help support them.

As you work to establish this environment, a simple line of questioning will reveal whether you are capable of recognizing your customers.

“What do we already know, and have a right to use, about each customer that can help us decide how best to engage with them, and where is it?” shares Wilson. “If there are critical gaps, determining how to best get that information, and where to retain it automatically follows.”

STEP 2: RESPONDING PROPERLY

Customers will not praise you for keeping good records about their profiles, past feedback, and historical purchases. They will praise you for using that intelligence to create better, more frictionless journeys.

Recognition is only valuable insofar as it informs responses.

The best responses occur at both the aggregate and the individual level. They involve orchestrating journeys based on customer data, ensuring that customers with a particular intent get to the appropriate channel as quickly and easily as possible. They also involve proactively tailoring individual conversations to specific customers and issues, while eliminating the repetitive “qualification questions” that waste time, cause frustration, and send the message that agents do not really know, let alone understand, the customers with whom they are speaking.

“Presenting your customer with an informed view of why they might want to connect with you, that reflects both their preferences and relationship, begins to build the customer’s sense of experience,” remarks Wilson. “It’s an immediate shift, with the conversation becoming more about them, and less about you.”
Challenge your customer engagement design with “How can we get the customer to what they want more easily?”

This process, too, hinges on complete operational alignment. Since customer journeys span multiple touchpoints, functions, and departments, it takes company-wide collaboration to orchestrate successful experiences. All stakeholders have to agree on the objective for the customer experience, the role they play in executing the experience, the impact systems will have on gathering relevant customer data, and strategies and processes for using customer data to tailor all experiences to specific customer needs.

“What I like to see is an executive stakeholder, and a cross-functional team, that is responsible for achieving the Vision,” says Wilson. “It’s equally important to acknowledge that what you are building is an integrated business system. As you move through requirements to design, in each component of the solution (Marketing, CX platform, CRM platform, support and service, sales, customer service, scorecards, hiring, training, and so on), it’s important that everyone be aware of decisions that are being made.”

The absence of such collaboration, more often than not, undermines the success of the experience.

“In my experience, 90% of customer service design decisions have never involved a marketing resource,” remarks Wilson. “Likewise, at the last marketing conference I was at, there was not a single example of customer journey awareness or customer feedback from that journey that extended beyond the point of sale.”

A well-orchestrated journey will help customers get to the right touch point for their issue. Once there, it is up to the individual agent (or bot) to engage the customer in a pointed, personal conversation. In general terms, there are two types of systems that will help agents use recognition of customers to inform personalized responses.

They will surely need access to actionable intelligence about each customer. Robust CRM and knowledge systems, layered with AI, answer this call, providing agents with precisely what they need about a given customer at exactly the right time. From insight into who the customer is to predictions about why the customer is getting in touch, these data tools help agents begin the conversation on the right foot.

Agents also require customer experience platforms that allow them to use customer data to respond in an efficient, personalized manner. Far too many organizations use independent (and incompatible) tools for each channel, simultaneously frustrating agents and preventing them from engaging in an efficient and personalized conversation.

“It is important to draw a distinction here between a CRM platform and a CX platform,” advises Wilson. “Confusing the two, (for example having chat handled in a CRM platform because it can, but relying on a different platform for voice, because your CRM platform can’t), leads to a mess of complexity. Logical architecture becomes key.”

An organization that gets both aggregate journey orchestration and individual conversations right will directly address the lingering pain points identified in the Market Study. Issues like long wait times, multiple transfers, trouble finding the right agent, and repetitive questions will become a thing of the past.

**STEP 3: ACHIEVING THE BEST OUTCOME**

Suppose your friend called to see if you wanted to watch the big fight Saturday night. By looking at the ID on your phone, you knew who was calling. Aware of your shared anticipation for the fight, you also knew why he was likely calling. You proceeded with the call accordingly, but then ultimately failed to answer your friend’s question. You ended the call without making plans to watch the fight, let alone a decision about whether to order it at home or go to a bar.

You may have engaged in a personal conversation, but you did not deliver a personalized experience. You did not actually address your friend’s intent, and you could not realistically expect him to be satisfied.

The same logic applies to the customer experience. Recognizing, properly routing, and sufficiently greeting customers all strengthen the journey, but the experience ultimately lives or dies by the outcome. Did the customer get what they wanted? Did you either honor the customer's direct request or provide a workable alternative?
In pursuing the ideal outcome, you will want to strike the optimal balance between two factors:

- What is the best possible way to address a particular intent?
- What is the right way to address a particular customer?

In many cases, these concepts will be one-in-the-same. For example, there is really only one way to support a customer who wants to pay a bill, regardless of the particular customer’s personality or sentiment.

Other cases involve more nuance. Someone who complains about the service at a restaurant, for instance, may expect outcomes ranging from getting their food more quickly, to an apology, to a free dessert, to a gift card for a future visit. In that scenario, the restaurant will have to pair its experience handling past incidents with its assessment of the particular customer’s profile and sentiment to determine the best way to proceed.

From an operational standpoint, this means companies will simultaneously need to provide agents with a blueprint for responding to issues yet empowerment to ignore “the script” in certain cases. An environment of this sort requires the right combination of culture, training, technology, and metrics.

Culturally, the company needs to send the message that individual customer satisfaction matters. Rather than feeling as if their job is to “follow the policy,” agents need to know that their ultimate goal is delivering satisfactory experiences for customers.

Trainers reinforce this notion by coaching agents on human factors and the company’s broader experience ambition, along with procedural details about products, processes, and systems.

By layering AI over their CRM and knowledge tools, companies can provide agents with real-time intent predictions, sentiment analysis, and next-best action recommendations to fuel productive, personalized conversations.

More nuanced than simply “downplaying average handle time” (which may be a mistake in general, as certain customers want fast calls), this involves putting the power in customers’ hands. It should be the customer, for example, who decides whether the agent delivered a resolution on the first contact.

More broadly, it is important to recognize the limitations of metrics. Scores may offer a retroactive window into performance, but they do not inherently explain the best way to handle a particular customer in a particular moment of truth.

“NPS, CSAT or CE scores don’t help [with personalization],” explains Wilson. “They give you averages, but not an understanding of the customer’s level of frustration in the moment.”

Following these collective steps does not guarantee a company will deliver exactly what the customer wants in every possible situation. It does, however, help the experience progress in a way that will maximize the value of each conversation.

“Sometimes, you aren’t going to be able to deliver a great customer experience, simply because the outcome they want can’t be delivered,” admits Wilson. “To the degree you can justify that unsatisfactory outcome in a manner the customer can accept, the more you lessen the impact on the experience.

“Remember, in the digital world, your competitor is only a “tab” away, and as many purchasers go online first, your digital brand may be all that separates you from a potential customer, except for the cost of the product,” notes Wilson. “As a company you must either believe you can win with commoditization, or you must elevate delivery from the standard of event-triggered engagement to relationship building Experience as a Service.

Part of delivering the best possible outcome is identifying opportunities to deliver better outcomes in the future. As you analyze your existing interactions, identify opportunities to more quickly and accurately recognize customer context (and the right response for that context), more meaningfully communicate empathy and appreciation, and more actively leverage proactive communication to reduce customer effort and improve engagement.
WHY AI LANGUAGE TESTING IS THE KEY TO CONNECTING WITH CUSTOMERS IN TODAY’S CHANGING WORLD

For all the changes stemming from COVID-19, one thing has remained the same: the ultimate goal of the customer contact function is still delivering frictionless, personalized experiences throughout the journey.

This objective is, in fact, more important than ever. As the CCW Digital Consumer Preferences Survey reveals, 60% of consumers now care more about the experience when selecting which brands to support. Two-thirds of consumers, meanwhile, say they will consider switching to a competitor after just one or two bad experiences. Consumers are also placing unprecedented importance on factors like phone call quality, transparent communication, and the ability to seamlessly move between agents and channels.

Already a daunting task, delivering a customer-centric experience is particularly challenging amid the rise of remote work, tightening of budgets and resources, and introduction of new operational silos and complexities.

There are, however, opportunities to improve performance - and deliver more customer centricity - in this time of vast challenge and uncertainty. One such opportunity impacts the agent recruiting process. Specifically, it involves optimizing language testing to more cost-effectively find, train, and retain the best possible agents. Operational productivity will rise, internal engagement will increase, and customer happiness will skyrocket.

Along with detailing the urgency of improving the language testing process, this briefing shares specific improvement steps -- and proof that they work in practice.

LANGUAGE TESTING: ALWAYS A CHALLENGE

Great customer experiences hinge on high-quality conversations. If agents cannot quickly communicate valuable information while building meaningful rapport with customers, high satisfaction and loyalty scores will be impossible.
Great conversations, of course, hinge on strong language capabilities. Agents who lack comfort - let alone mastery - with a given language cannot make sufficient connections with customers. They will struggle to ask the best questions, fail to interpret customer intent and sentiment, and ultimately deliver slow and unengaging experiences.

But while the importance of language may be obvious to most companies, few have mastered the process of testing for those language capabilities. Existing, manual measures tend to be as inefficient as they are ineffective, yielding recruiting processes that are costly and time-consuming without even offering the rewards of better agent performance or retention.

1. **Conversational testing is vulnerable to significant bias and subjectivity.** An in-person recruiter may mistake a candidate’s natural charisma for language competency, leading them to hire people who will ultimately struggle to develop product knowledge and support customers.

2. **Manual testing can be a time-consuming process, which is a luxury many contact center recruiters do not have.** Some are responsible for immediately hiring a mass of agents to meet an internal or third-party need. Many, moreover, recruit from a talent pool that expects an “on-the-spot” offer following a successful interview.

3. **As they assess “academic” language capabilities,** traditional language testing may not sufficiently inform an agent’s ability to engage in natural conversations and deliver stellar experiences.

4. **Often broad and static in nature,** traditional language tests may not sufficiently determine whether an agent can handle a company’s specific issues or support a particular demographic of customers.

Collectively, these limitations lead to significant problems for contact centers. In addition to hurting the recruiting process, poor testing may also lead companies to make the wrong decisions about which agents to hire. Some will hire agents who, despite their passing test scores, cannot meaningfully converse with customers in practice – and therefore neither perform well nor enjoy their work. Training costs will rise while agent engagement and retention rates fall.

### HEIGHTENED CHALLENGES IN TODAY’S NEW NORMAL

Language testing was already a challenge when recruiters conducted in-person interviews and all employees worked out of a singular location. COVID-19 made it a much more urgent one.

With over 80% of companies adopting remote work during COVID-19 and 73% confirming plans to continue their work-from-home offerings indefinitely, today’s candidates are generally not participating in on-site interviews. Today’s employees are generally not working in a physical office alongside their peers, coaches, and supervisors. Many employees and customers, meanwhile, are dealing with additional distractions and inconveniences in their at-home environments.

These factors simultaneously heighten the importance of language capabilities and exacerbate the drawbacks of existing testing protocol.

> “Providing that customer experience starts with contact centers fully staffed with highly-qualified agents,” explains Brigham Tomco, CEO and co-founder of Emmersion. “This is a major challenge for nearly all of the contact centers we talk to. Their new normal is the need to find qualified candidates and staff entire contact centers without even meeting the candidates in person.”

1. **Dealing with dramatic changes in volume and new customer expectations,** some companies need to quickly increase their headcounts. Infamously time-consuming, traditional language tests prevent companies from rapidly scaling their recruiting efforts.

2. **Already subjective and ineffective when conducted as part of face-to-face meetings,** language tests can be even harder to execute during remote video interviews.

3. **With COVID-19 increasing omnichannel communication,** agents require the ability to successfully communicate via voice and text. Language testing, therefore, needs to evolve to assess competency in all communication channels.

4. **With fewer opportunities for face-to-face guidance,** new agents will have to independently develop knowledge and perfect their customer engagement skills. They will also have fewer opportunities to ask their peers or supervisors for help during interactions. Strong language skills are essential for succeeding in this more autonomous landscape.
“When agents were uncertain how to answer a question in the past, they could simply and respectfully place the customer on hold, turn to their neighbor or mentor for help, and then return to the call with the answer,” summarizes Tomco. “With the digital transformation to work-from-home, this process will be more difficult. They not only need access to all that information, but they need to communicate effectively with the customers. When so many of our contact centers are located internationally where the agents are speaking English as their second language, the foundation of this customer experience is the agent’s English proficiency—the global language of business.”

HARNESSING THE POWER OF AI LANGUAGE TESTING

With COVID-19 exacerbating hiring challenges at the same time it is introducing new operational issues and bigger customer demands, the importance of revamping language testing has never been more urgent.

“Contact centers need to get more from their efforts,” declared Dr. Jacob Burdis, creator of the TrueNorth Speaking Test and co-founder of Emmersion. “They need to employ more efficient and effective recruiting processes, recruit more highly qualified agents, provide better tools to help them develop, and empower them to develop at their own pace. This simply can’t be done the same way it has been done in the past.”

Instead, customer-centric companies will leverage AI language testing.

By adopting this innovative approach to language assessment, companies ready their contact center for the new normal. They improve the ability to scale their contact centers, account for the rise of remote work, and improve agent retention at a time when operational consistency is immensely important. These benefits will all trickle down to the customer, yielding higher-quality, more personal, more resolute conversations.

“AI has made it possible to do remote language testing—not just in reading, grammar, and vocabulary, but also in speaking,” says Dr. Burdis. “AI allows for a reduced test length and more objective scoring. It is infinitely more scalable and affordable, and it can be done remotely with improved accuracy and reliability.”

1. **AI language testing solutions**, such as the TrueNorth Speaking Test by Emmersion, can quickly, accurately and objectively assess speaking ability.

2. **Tests, which do not need to be administered by an in-person “proctor,” account for candidates’ ability to process conversations**, repeat and rephrase information, and confidently answer open-ended questions.

3. **The AI-driven tests can be adaptive**, tailoring prompts based on the candidate’s background and company’s needs.

4. **The robust, instant scoring system accounts for various nuances of a candidates’ speaking ability**, including difficulty of vocabulary, repetitive use of phrases, pauses, and quality of sounds and words.

5. **In addition to providing a more accurate assessment**, this robust evaluation helps recruiters understand the pros and cons of each candidate. With this information, companies in a staffing crunch can intelligently relax certain standards while still ensuring they are hiring agents with enough competency to perform pivotal tasks.

6. **The nuanced scoring can also help companies make accurate predictions about a given agents’ long-term success and happiness on the job**, leading to higher retention rates and thus more consistent customer experiences.

The benefits of AI language testing will manifest in all facets of the experience. For starters, they will lead to more effective and scalable recruiting processes. They will also uncover more actionable details about incoming employees, helping trainers better tailor their coaching and supervisors better allocate and manage talent. Collectively, these factors will improve agent productivity and happiness.

By retaining more competent language speakers for the long haul, companies ensure higher-quality experiences for customers. They can double-down on this advantage by orchestrating journeys based on the language capabilities of their agents. If “competent” speakers handle simple issues and stellar ones handle more complex or emotional ones, customers will always have fast, seamless access to the best possible support.
AI language testing will also delight budget holders, as these operational and experiential advantages will not increase costs for the business. In fact, they will lead to dramatic savings.

"In terms of ROI, taking the recruiter out of the language testing process saves 30 minutes or more of their time per applicant," says Tomco. "Many of our contact center customers easily interview 5,000 or more candidates each year. That could total over 2,500 hours each year with just screening candidates for language ability. Retention based on language ability increases since companies are able to hire qualified candidates. Ultimately, companies could save tens to hundreds of thousands of dollars each year by eliminating the need for in-person language testing."

Indeed, Emmerson’s platform has produced demonstrable benefits for leading contact centers. They are saving money, gaining more insight into prospective agents, hiring more quickly, improving operational performance, and creating more satisfying customer experiences.

Example success stories follow:

**Company: One of the largest contact centers in the world**

**Challenge:** Current solutions are slow and time-consuming in the customer experience industry. Often, applicants expect an offer in their first interview and by the time their language score comes back 48 hours later, it is too late. The applicant can find employment with another company that has a faster onboarding process.

In order to compete, this particular contact center was hiring unqualified candidates, and in turn, had a very high turnover rate when they found out the candidate was not actually qualified. This was a headache for the contact center, their clients, and the candidates.

**Solution & Result:** Emmerson was able to provide a fast, reliable, and accurate solution with our patented TrueNorth Speaking Test. It provides instant and accurate results with a 15-minute test, making the applicant screening and hiring process much more efficient and smooth.

**Company: One of the largest contact centers in the world**

**Challenge:** The need for accurate, specific test results was key in the contact center / business outsourcing industry. This contact center wanted to standardize their hiring process by setting a specific benchmark score that determined whether the candidate was qualified for the job based on their English ability. However, they wanted a raw score rather than a pass/fail like most other companies offered. This way, if the candidate were close to the level, they could do additional testing.

**Solution & Result:** Emmerson offered a specific grading scale on which recruiters could see the applicants’ scores. Their benchmark score was at 6.4, and TrueNorth still provided scores at 6.3 rather than a pass or fail so the recruiters could do additional testing. This provided better screening capabilities, as well as better hires.
THE IMPACT OF AI ON CX THROUGH CONTACT CENTER OPTIMIZATION

Artificial intelligence is being used in many ways to improve customer experience, and innovative new use cases are emerging all the time. Organizations are using AI to handle more complex situations that used to require human intervention, to enable more customer self-service, and to extend this enhanced customer support across channels. AI is being layered with current interaction analytics solutions and emerging techniques encompassing machine learning and robotic process automation to serve customers in new ways, raise customer satisfaction and give organizations more insight into their customer interactions.

Customer experience has explosively emerged as a critical driver for loyalty, competitive differentiation and revenue growth. As a result, the tools needed to benchmark present performance as well as illuminate future expectations within customer interactions are changing. Market demands continue to drive innovation shifts especially with analytics. The next wave is how artificial intelligence is efficiently being applied to more quickly, accurately and predictively impact awareness and outcomes within the contact center and beyond.

DEEPER DIVE: USING AI WITH ENGAGEMENT ANALYTICS & CONTACT CENTER AUTOMATION

One of the reasons AI is making significant improvements to customer experience for many organizations is because it complements the contact center technologies and processes already in place. This enables organizations to get more value from the data and best practices they have developed over time. Customer engagements go from being reactive to proactive when the predictive power of AI is introduced to contact center operations.

Artificial intelligence is an additional layer of insight that can be applied within speech or engagement analytics platform. It allows analysis to be performed on greater volumes of unscripted, free-form conversations and other unstructured data sources. AI takes analytics from merely being a way for contact center managers to extract data and create a database to search and analyze, to something that will also automatically review the collected information and offer solutions. By teaching the software to make decisions that typically require human interaction, businesses set themselves apart from their competition.
For example, one company used AI to very accurately predict which of its agents would leave their jobs. Using that predictive insight, the company developed appropriate workforce development strategies for different types of agent.

The value from that anecdote is supported by research – 78 percent of organizations believed AI and machine learning would improve employee retention and job satisfaction according to one study, which also found that 31 percent of organizations that are using AI and machine learning to improve their business processes achieved at least a 10x improvement in their KPIs.

Current contact center and CX platforms do not have the underlying technology to provide these benefits.

Accenture noted “Artificial intelligence (AI) and deep learning are reinventing how work is done in ways beyond our imagination. Organizations across industries are using these technologies to speed processes, reduce costs and free employees from repetitive tasks.” and “While many companies are employing some degree of automation, only 9 percent are using the full force of AI.”

UNLOCK THE VALUE OF YOUR DATA – SPEECH IS AN UNTAPPED GOLD MINE

In our experience, call center audio recordings are the most valuable untapped source of customer data. This data has been historically ignored by only manually listening to a small percentage of calls, but AI makes it efficiently reasonable for organizations to mine insights from it. For example, AI has been applied to analyze past calls, compare them with customer history records and create models that can accurately predict a customer’s risk of attrition. That predictive analysis can be used to guide interactions with customers in real time – during the call – to reduce the risk of customer attrition and improve agent performance.

AI has also been used to create highly accurate categorizations of customers that are likely to call back or otherwise reengage the company based on the outcome of the initial contact. These categorizations are based on the words used in the call, sentiment, metadata and more. By anticipating reengagement, companies can proactively reach out to the customer with an appropriate message or content, such as sending more information, a special offer or troubleshooting tips.

USE CASES & PROOF POINTS

The value that artificial intelligence can produce for a contact center depends heavily on the processes to which it is applied. AI by itself does not improve customer experience or agent productivity. Rather, it streamlines processes and gives organizations the insight to create new ones that deliver these and other benefits. For example, AI can be used to find a cause-effect relationship between what transpires during a contact (the words used, emotions expressed, questions asked and more) and the action the customer ultimately took. AI can help identify and isolate many variables to provide better insight into cause and effect. These insights can inform process improvements, such as developing new scripts or pathways to guide contacts to the desired action. Here are some examples of how combining artificial intelligence with interaction analytics can benefit contact center operations.

**Improve first call resolution (FCR)** – As a live call or online chat progresses, AI can predict the direction the interaction will take, including accurately forecasting whether the customer will make a future contact. Based on the forecast, recommendations could be made to guide the agent and prevent the need for follow-up contact.

**Increase customer satisfaction** – AI can predict whether a contact will be satisfied or dissatisfied with a specific action an agent could take, thereby helping agents take approaches that satisfy customers. AI has been used to accurately predict a customer’s Net Promoter Score (NPS), Customer Satisfaction (C-SAT), or Customer Effort Score (CES).

**Prevent customer churn** – Increasing customer satisfaction helps reduce churn. AI is also being used specifically to prevent churn by analyzing historical data to identify at-risk customers so companies can proactively take action to engage customers and get the chance to improve customer satisfaction.
Identify upsell opportunities – Artificial intelligence can help organizations upsell in several ways. It can rate how likely a customer would be to respond to an upsell request and work in concert with the interaction analytics system to prompt agents to try upsell the best prospects and avoid spending time on low-likelihood customers and potentially agitating them. With AI and interaction analytics, language and sales sequences can be optimized to different customer personas to improve closing rates. AI can also be used to power recommendation engines, which is valuable in online transactions where no human agent is involved.

Improve agent training – The predictive powers of AI can be used to accurately forecast how well individual agents will perform in different situations. That insight can be used to identify where additional training and coaching needed and to tailor the guidance to the agent.

Using data to train chatbots – Chatbots are trending in channel popularity, be it fully automated, agent manned or a hybrid. But what is needed in order to set up and train an automated bot are real conversations. As we stated, the speech transcriptions from your call center are a data goldmine to train chatbot interactions. Customer service agents see the value of such capabilities – 64 percent believe AI-powered chatbots will enable them to provide a more personalized experience to customers.

Reduce agent turnover and improve job satisfaction – Prepared, properly trained agents are happier agents. Approximately three quarters of organizations that use AI and machine learning said their employees are doing more interesting work as a result of machine learning-enabled processes, and 78 percent said machine-learning-enabled processes will result in improvements in job satisfaction and retention. For their part, 59 percent of customer service agents said chatbots made them feel more satisfied in their jobs and more committed to the company, and 79 percent believe that handling more complex customers improves their skills.

CONCLUSION

Artificial intelligence represents the next step in customer contact evolution. It gives new value to old, previously untapped data and helps organizations continuously make customer experience better by learning what works and applying the results. Today AI is creating differentiation for the early adopters and giving them a competitive advantage by helping them know their customers and deliver positive experiences. Soon, having artificial intelligence embedded into customer contact processes will be table stakes, and enterprises that can’t mine their data and quickly predict customer and agent behavior will be at a competitive disadvantage. It is no exaggeration that is a game changer for better customer experience, contact center operations, agent performance and bottom line for your organization.

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i Accenture blog “AI: Not just a flash in the pan” June 11, 2018.
iii Forrester Research “Predictions 2019: Customer Service And Sales Invest In Humans In 2019, As Chatbot Backlash Will Emerge” November 8, 2018. Daniel Hong, Tom Kaneshige, Ian Jacobs, Kate Leggett, and Art Schoeller
v “Aspect 2017 Agent Experience Survey: Agent and Chatbots: Better Together”
INTRODUCTION
The traditional view of the contact center as a necessary cost of doing business is changing.

As customer behaviors and digital services evolve, organizations are looking to the contact center to deliver on customer-centric strategies that impact critical business metrics, including:
- Cost
- Efficiency
- Revenue
- Risk
- Customer Satisfaction

To address all of these priorities, forward thinking contact centers are leveraging a technology platform approach that streamlines, automates, and engages agents and customers alike for strategic advantage.

Read on for insight into three key areas where next generation contact centers are leveraging technology to drive major business impact.

METRIC # 1: CUSTOMER LIFETIME VALUE
Consumers in the age of Amazon and Google expect convenience, customization, and instant results. That’s what makes happy customers, and across industries, happy customers spend more money and have deeper loyalty to brands. Loyal customers in turn have higher lifetime value and contribution to profitability:

Increasing customer retention by 5 percent can increase profits by up to 95 percent.¹
- Forrester Research

Increasing customer lifetime value requires more than merely measuring your Net Promoter Scores (NPS), Customer Satisfaction Scores (cSAT), and First Call Resolution (FCR). It requires a holistic ability to service customers more efficiently, with increased personalization and higher quality that makes an impact. Being able to tailor products, services, and interactions to customer preferences is critical.

Technology To Impact Customer Lifetime Value

Leveraging technology that empowers agents to do their job more effectively and provides a deeper understanding of the customer, allows agents to deliver more personalized, quality service while resolving customer inquiries faster.

The technology intersect:

- Use Dynamic Case Management to provide agents with a single, holistic view of the customer across account information, purchases, and interaction history
- Support an Omni-Channel Environment to provide a seamless experience for customers across the channels through which they engage
- Incorporate Artificial Intelligence (AI) for predictive personalization to customize experiences and sentiment analysis to determine customer temperament

One McKinsey study found that for a European power utility, putting customer experience at the core of its commercial transformation enabled the organization to reverse the decline in its market share, reduce customer churn, and increase financial results by more than €75 million.2

METRIC #2: REVENUE GENERATION

In the digital age, it’s challenging for organizations to cut through the clutter and stand out in the mind of customers. Every interaction presents an opportunity, so leveraging front-line customer support as a growth generator has now become a focus area for organizations.

These are the people having the day-to-day interactions with customers. Enabling them to fulfill customer desires through effective processes and case management, and even anticipate them through artificial intelligence, is key.

As Accenture’s survey points out, customers want to engage with organizations that are leveraging innovative technology, like AI, to improve how they interact with and create personalized experiences for their valued customers.

Some of the ways organizations are using the contact center to generate revenue include:

- Providing upsell suggestions to agents
- Offering agents best next actions to cross-sell products and services
- Generating targeted marketing offers
- Using customer preference insights to drive product development
- Leveraging co-browsing to demo products on the spot
- Utilizing online or mobile conversations to facilitate customer orders

Technology To Impact Revenue Generation

The contact center, as the hub of communication, is a goldmine of rich data on customer preferences and purchasing behaviors that can be turned into actionable insight for continuous improvement and new revenue opportunities.

The technology intersect:

- Use Omni-Channel Engagement to bring together communication channels, customer journey touchpoints, and smart decisioning into a single, intuitive interface for agents
- Leverage Artificial Intelligence (AI) to provide agents with AI-infused next best actions, predictive personalization, and smart recommendations
- Incorporate Robotic Process Automation (RPA) to handle repetitive, manual tasks, freeing up agents to focus on customer interactions

Aviva, the largest insurer in the UK, leveraged smart automation to reinvent their contact center operations. Front line advisors have a single view of the customer and policy information in one interface, consolidating 22 systems. Robots work alongside support staff, handling the repeatable processes, so advisors can spend more time talking to customers. The impact for Aviva has been a 9 times acceleration in customer service response time and 40% operational cost savings.4

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2 McKinsey, “The power of customer experience in energy retailing.”
METRIC #3: REDUCED RISK

Large scale data breaches are too common these days. It's no secret that contact centers handle sensitive customer information and requests daily. Monetary fines, consequences to brand value, and risks associated from not having the right measures and processes aligned can be significant.

The average total cost of a single data breach in 2017 was $3.62 million. - The Ponemon Institute

Next generation contact centers can play an important part in managing this risk. It's imperative for organizations to stay ahead of and have the proper protocol in place for:

- Evolving compliance regulations, including the General Data Protection Regulation (GDPR)
- Data security measures, including Payment Card Industry Data Security Standard (PCI DSS) Compliance
- Fraud identification and prevention
- Adherence to Standard Operating Procedures (SOPs)

A major retailer's now-infamous 2013 security breach resulted in the theft of 40 million debit and credit cards and 70 million other records, including customers' email addresses and phone numbers. The company has since reported total costs of $292 million from settlements, legal fees, credit report monitoring for customers, and other breach-related expenses.

Technology To Impact Reduced Risk

As organizations revisit the importance of data management and process practices, the need to keep systems compliant, secure, reliable, and built for scale becomes a huge cost burden.

This is where a robust platform that orchestrates processes, business rules, and workflows comes in. Organizations can build applications that meet security, confidentiality, and compliance controls, while accelerating time for deployment—and in turn, time to-value for the business. This makes it easy to ensure regulations, including GDPR requests from clients enacting their “right to be forgotten,” are handled correctly.

The technology intersect:

- Leverage Business Process Management (BPM) to handle critical processes, business rules, complex events, and workflows
- Incorporate Dynamic Case Management to converge data, case information, document management, and audit history
- Look to a Low-Code Cloud Platform to offload the system maintenance and compliance to a trusted third-party source, while accelerating the ability to deploy unique, powerful applications

Improve The Metrics That Matter

Contact centers that leverage the right technology can achieve increased customer lifetime value, revenue generation, and reduced risk.

Look for an innovative platform that enables you to quickly deliver an integrated customer experience across channels and customer touchpoints, through:

- Omni-Channel Engagement
- Dynamic Case Management
- Intelligent Automation with BPM, AI, and RPA
- Low-Code Cloud Platform

ABOUT APPIAN

The Appian Intelligent Contact Center™ makes it easy for organizations to build next generation contact center applications that increase customer engagement, improve agent efficiency, and deliver strategic business impact. To learn more, visit appian.com/platform/intelligent-contact-center.

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5 Ponemon Institute, 2017 Cost of Data Breach Study: United States.
BEST PRACTICES TO GET CALLS ANSWERED

No matter if you’re on the dialing or receiving end of a mobile phone, we can all agree on one thing: nuisance and fraud calls are the scourge of modern times.

These unwanted auto-dialed spam calls ring our mobile phones continually, and this incessant problem is only getting worse due to a lucrative profit motive for scammers. According to Hiya’s most recent State of the Call report, spam calls grew to 54.6 billion in the United States in 2019, up 108% compared to the previous year, and consumers receive an average of 14 spam calls per month. As our phones continue to be inundated by robocalls, many people no longer want to pick up the phone at all, with less than 47% of all calls being answered.

Making matters even worse are some call blocking solutions flag legitimate calls as fraud or spam due to poor spam detection intelligence and a lack of knowledge into how different industries place phone calls.

Unfortunately for businesses, the lack of trust in unidentified calls and the misclassification of spam calls means your calls are most likely going right to voicemail.

Businesses have it tough out there, but getting customers to answer your calls doesn’t have to be a losing battle. While spam calls have made people wary of answering their phones, the voice call is still the preferred form of communication for many industries, from healthcare to financial services to education.
HOW TO MINIMIZE THE RISK OF BEING FLAGGED AS SPAM

For legitimate businesses, being flagged incorrectly as spam or fraud can be frustrating and detrimental to the success of your business. These eight tips will reduce the probability of your calls being mislabeled as spam or fraud.

1. **Avoid using only local phone numbers.** Neighbor spoofing is a common way for scammers to get people to pick up their calls, using an unknown number that looks a lot like the numbers where someone lives. The call will have the same area code and maybe the same prefix (the three numbers after the area code) as the recipient’s number. The bad guys buy these numbers in bulk because this technique works to get people to think it’s someone local or a neighbor calling. Because it works, valid businesses also buy local or neighbor numbers to increase the chances of their calls being picked up. Unfortunately, doing so also increases your chances of automatically being labeled as spam.

2. **Avoid shared lines for multiple businesses.** A single phone number in use by a call center for multiple, unrelated businesses will create a mix of reputation signals for all businesses involved. As it is not possible for spam filters to tell which business is being represented for each call, it is a better idea to use dedicated phone numbers for different businesses.

3. **Avoid mixed-use lines for the same business.** A single phone number used by a business both for customer service and for marketing/promotions has a high risk of being flagged as a telemarketer, which would be applied for all calls including customer service. A better option is to dedicate phone lines based on the type of message being delivered so crucial customer service phone numbers are not classified as telemarketers.

4. **Limit use of public phone numbers.** One way scammers get their calls through is by impersonating legitimate businesses by using the business’ phone numbers most easily found on their website. Either don’t publish phone numbers publicly, or use different phone numbers for critical outgoing business call purposes such as notification or bill collection. This reduces the risk of misclassification, and the damage to your reputation and bottom line if an error does occur.

5. **Set up Do-Not-Originate lines.** It’s recommended that major business lines be configured as “do-not-originate” (DNO), meaning the number is only for receiving calls to the business, never for outgoing calls to individuals. Services like Hiya can detect and flag the limited outgoing traffic on DNO lines as fraud. Register your DNO numbers with Hiya to receive protection against impersonation spoofing.

6. **Limit the window of time for contact.** While legally a company may be allowed to contact individuals up to a year after having a previous engagement with them, many individuals begin reporting the number as spam much sooner than that. Respect the individuals’ wishes not to be contacted and consider limiting call campaigns to within 90 days of the last engagement.

7. **Respect the do-not-call list.** Do-not-call list violations may lead to reports to the FCC, which are a major reason why your business lines may be classified as spam. Be careful to respect this list and you’ll avoid incurring consumer complaints against your number.

8. **Monitor call center activity.** A common cause of spam reports against a business are from call center abuse such as excessive calling (multiple times a week or even multiple times a day) or calling outside of acceptable hours in the call recipient’s timezone. Good call center governance can keep your business reputation high.
HIYA CONNECT IMPROVES VOICE CALL PERFORMANCE

With Hiya Connect, businesses are able to instill trust in their voice calls by providing identity and context at the first ring. With Hiya, display your business name, logo, and call reason to significantly increase call completion rates, customer satisfaction, and topline revenue. Hiya Connect helps businesses:

- **Increase contact rates.** Consumers are frustrated with the amount of fraud and nuisance calls they are receiving and therefore expect, more than ever before, context when receiving a phone call. Hiya Connect presents a company’s brand identity, so more consumers will pick up or call back numbers when they know who is calling.

- **Leverage the power of their brand.** Businesses spend a significant amount of time and money building their brand, only to be stuck behind an anonymous phone number at the critical moment they’re trying to reach their customers. Hiya Connect allows businesses to leverage the credibility they’ve built with their brand’s reputation at the very moment that they are trying to reach their customers.

- **Restore trust in the phone call.** A phone call is the most personalized form of communication between a business and their customer, outside of face-to-face interaction. Hiya Connect helps businesses establish and restore the trust that has been impacted by the proliferation of spam calls and not only increases contact rates, but also the quality of conversations a business has with its customers or prospects.

- **Access important call analytics.** Enterprise call centers measure every aspect of their business and the Hiya Connect Console provides an additional layer of intelligence on every aspect of the call, from answer rates, to call duration, and more.

Hiya Connect is currently deployed in 40+ countries via Hiya’s Android and iOS apps, through carrier networks, and through the company’s partnership with Samsung. It requires no technical integration and can be up and running within minutes. For more information, please email connect@hiya.com.

### ADDITIONAL INFORMATION:

- Learn more about Hiya Connect here: [https://hiya.com/connect](https://hiya.com/connect)
- Download and read the entire State of the Call report here: [https://hiya.com/state-of-the-call](https://hiya.com/state-of-the-call)
12 REASONS WHY CUSTOMER SERVICE CHATBOTS FAIL

Customer service chatbots are a white-hot topic nowadays. Vendor marketing drumbeat is loud, and they promise nothing short of eradicating world hunger with their chatbots! However, if you look beyond the hype, success stories are few and far between.

54% of online US consumers think that interactions with customer service chatbots will negatively impact the quality of their lives, per Forrester’s latest research, who predicts a chatbot backlash this year. A customer called the virtual assistant of a business he was dealing with a “virtual idiot”!

How do you prevent your virtual assistant from suffering such ignominy?

HERE ARE 12 MISTAKES TO AVOID

1. Doing too much
While a chatbot can become smarter over time, trying to do too much with it at the outset often leads to failure. It is best to limit its scope to a narrow set of use-cases and intents to get a quick win and then gain momentum.

2. Passing the onus buck
When customers have a specific question, many chatbots just push back web pages or FAQs or documents instead of answering the question. It is like giving the entire haystack rather than finding and handing over the needle, which is what is expected from a chatbot.
3. Not understanding
It is important to first understand the intent of the customer for fast time to answer. Except for the lonely soul or two out there, consumers are not looking to socialize with chatbots—they want quick answers. A good practice is to use human chat conversations, label the intent, and use machine learning to match the customer utterances to intents.

4. Do it my way
I was trying out a chatbot that had been touted as a success story only to have it repeatedly tell me to rephrase my question. I unloaded all the synonyms from a thesaurus and all the language variations I know (US, UK, etc.) to no avail. Step #3, combined with robust Natural language Processing capability can help understand intent better.

5. Stopping with intent
Understanding intent is a good first step. Next, the chatbot needs to be able to converse and guide the customer to an answer, especially for the more complex queries. Look for a chatbot solution that is backed by AI reasoning to provide such guided, conversational assistance.

- One of our major telco clients uses our agent-facing bot, backed by reasoning and knowledge, to guide 10,000 agents in the contact center and associates in 600 retail stores to answers. The company has since seen a 37% improvement in FCR (First-Contact Resolution), 30-point improvement in Net Promoter Score (NPS), and 50% improvement in agent speed to competency.

6. The bot switch
Some businesses are looking at creating a concierge bot and a set of specialist bots, where the concierge passes the baton to specialist bots if it is unable to answer a question. Bot-switching can be as painful as channel switching and can lead to poor customer experiences, especially if the specialist bots cannot resolve the customer query.

The answer is in implementing a smart chatbot, powered by a robust knowledge base and reasoning capabilities, that can escalate to human chat agents with full context ensuring the best possible customer experience. Another approach is to make the bot switch invisible to the customer. In either case, the customer experience should be at the front and center of the approach.

7. Can we start over?
Chatbots should be able to escalate to human agents, based on customer sentiment, customer value, customer situation, its own inability to resolve the issue, or a combination of these factors. And, it should do so with all the context intact so that the interaction with the human agent moves the conversation forward instead of starting over.

Some queries may need long-lived, multi-step resolutions. In such cases, the chatbot should be able to pause a conversation and pick it up where it left off without asking the customer to repeat information or steps that had already been completed. You need a unified, omnichannel customer engagement system, backed by knowledge management and AI reasoning, to ensure these capabilities.

- One of our premier clients uses our chatbot to answer DIY tax-payer questions. Where needed, the customer is given the option to escalate to a human advisor with all the context intact. The advisor then chats and cobrowses with the consumer to answer questions and help fill out forms in real-time, a novel experience for the consumer and a win-win for both the consumer and the tax preparation giant!

8. The stagnant bot
While it is OK to start small, the business should make the chatbot smarter over time in both breadth and depth of knowledge and knowhow. Moreover, the knowledge base and AI reasoning paths need to be updated and optimized with analytics on an ongoing basis.

9. The hidden bot
Chatbots can go beyond reactive service to proactive engagement. It is important that you make it visible on your website. Feature the chatbot at least on the top 10 most visited web pages, in addition to the support section.
10. The curse of the (wait) cursor
When consumers look to get customer support, the last thing they want to do is stare at the wait cursor, whether it is the wheel or the hour glass! If your chatbot is not fast, they will defect. Make sure it can scale.

11. Misalignment with brand
Your chatbot needs to be aligned with the brand in both style and substance. If it is fronted by an avatar, make sure it is aligned with the personality of your brand and the target customer. So should the bot’s conversational tone mirror your brand style.

If it is a high-touch brand, you may want to escalate more quickly to a human if the chatbot is unable to answer the customer’s question.

12. Buying before trying
With many vendors promising omniscience from their chatbots, you are faced with the unenviable task of picking one. Technology capabilities are important and so is best-practice domain expertise. How long has the vendor been in the space? Do they put skin in the game by offering risk-free pilots with best-practice guidance, all free of charge? Get answers to these questions.

By avoiding these mistakes, you can make your virtual assistant a virtuoso assistant for customer service and engagement!
THE CUSTOMER EXPERIENCE OF THE FUTURE: FOUR BIG IDEAS THAT WILL CHANGE EVERYTHING

A NEW NORMAL IS EMERGING

More than ever, customers will remain loyal to brands that provide a seamless, omnichannel experience that is both memorable and effective, across all interactions.

When analysts, business leaders, and the media talk about today’s customer contact centers, the conversation inevitably turns toward digital transformation. While technology innovations are a catalyst for exciting changes in the world of customer experience management, there are other big ideas and solutions that will have an equally transformative impact.

Here’s a look at four big ideas that will transform the customer contact center across industry sectors and business functions alike.

BIG IDEA #1

Customer experiences will be human-centric, connected, and seamless across channels

77% of U.S. CEOs say they could further improve their understanding of their customers in order to personalize the customer experience.1

The contact center of the future must be designed around the human experience. In today’s digital world, customers expect proactive, connected, omnichannel experiences that focus on them, individually. It’s about taking a person-based, and not persona-based, approach to each interaction and being able to say “yes” to the most important questions that influence customer experience:

- Do you know me?
- Do you recognize me?
- Can you anticipate my needs?
- Do you empathize with me?
- Can you take care of me?

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1 Growing Pains, CEO Outlook, KPMG 2018
Building the next generation in customer experience solutions

54% of U.S. consumers say customer experience at most companies needs improvement.2

Organizations must find ways to orchestrate their customer, product, shipping, and warranty data across information silos, to create the personalized view of the customer that makes the desired service experience possible.

Human-centered design starts from the bottom up, at the data layer, which houses everything we know about the experiences, preferences, and characteristics of each customer. The analytics engine then leverages AI and machine learning to recommend “next best actions” to agents, thus enabling highly personalized customer interactions.

In most organizations, however, the customer and product data remain fragmented across channels and organizational silos. Without adequate investments in an integrated data platform, it is impossible to deliver a seamless, personalized, omnichannel experience.

More and more organizations have realized the importance of implementing integrated data platforms to create better customer experiences, drive revenue growth, and increase operating efficiencies — and are making the necessary investments to address the new realities of a post COVID-19 world.

Conduent has launched an industry-leading data orchestration platform that leverages AI, ML, and predictive analytics to help clients build the next generation in customer experience solutions.

BIG IDEA #2

The best contact centers will be both high-tech and high-touch

The contact center of the future will find the right balance between technology and human engagement. Customers expect memorable, personalized, omnichannel experiences with each interaction, with an ever-increasing focus on proactive resolution and self-service. Brands that deliver on that expectation are most likely to win.

Revenue growth and operating margins have become a function of an organization’s ability to deliver exceptional customer experiences. However, in order to ensure that delivering such experiences across channels is not cost prohibitive, companies need to invest more aggressively in proactive issue resolution and self-service.

High-tech

The modern contact center is an operation that can predict and proactively resolve issues before the customer ever has to make a phone call. AI, ML, RPA, and predictive analytics tools allow organizations to detect and anticipate potential business disruptions before they impact the customer. A world-class contact center operation will either proactively resolve an issue, or send an early warning signal to alert the customer of potential disruptions, thereby enhancing the overall customer experience.

If an issue cannot be proactively managed, self-service tools should come to the rescue. Companies need to step up their investments in self-service tools — treating self-service like a product by itself, not an IT project.

Proactive resolution and self-service should make up 70-80% of the customer interactions with the brand, if not more. Doing so not only enhances customer experiences, but also dramatically reduces operating costs.

For most organizations today, proactive resolution and self-service make up far less of the customer service experience — and this is a key shift that companies need to make.

High-touch

When self-service is unable to provide the resolution, studies show that customers prefer to reach out to a live agent, not a chat bot. The idea is online video chats enabling face-to-face, one-on-one interactions with expert agents who speak the relevant language, understand the cultural nuances and take care of the customer’s problem. These highly personalized, “moment-of-truth” transactions can have a huge impact on customer loyalty and the overall lifetime value of the customer.

Operating virtually, the modern service desk will be less about thousands of agents answering phones 24/7, and more about expertly trained people working side by side with customers to resolve issues that can’t be solved through automated channels.

Supported by an integrated data platform, as well as AI, ML, and predictive analytics, that provides relevant knowledge about customer priorities, preferences, and “next best actions,” agents will be empowered to interact with customers in more high-touch and personalized ways.

In keeping with the trends, an increasing number of organizations are investing in this live agent operating model: a modern contact center, focused on proactive resolution, self-service, and personalized human interactions.

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2 PwC, Experience is Everything: How to Get it Right: 2018
BIG IDEA #3

Performance will be measured on business outcomes, driven by customer experiences

As we reimagine the modern contact center, the traditional methods of performance measurement will inevitably change. Instead of simply looking at SLAs, clients will focus on business outcomes related to customer experience and lifetime value of a customer.

Think about today’s contact center where metrics such as average handle time (AHT) and average speed of answer (ASA) are considered the holy grail of performance management. But when an organization has data-driven, proactive issue resolution and self-service in place, average call handling times should actually go up — and that would be considered a good thing.

Why? Because in the contact center of the future, the only “calls” placed to a contact center would be those high-touch, complex issues that can’t be solved through self-service channels.

Maximize customer lifetime value and organizational growth

Conduent provides an integrated Learning and Performance Management platform and a service offering that advises clients on holistic approaches to change management and execution.

To align with the strategic objectives, performance KPIs for service agents will also need to change, with a focus on first contact resolution and customer experience, rather than tactical measures such as average handle time.

For example: a balanced measurement framework, with greater weight on customer net promoter scores; first contact resolution; and mean-time-to- resolve (rather than tactical measures such as average handle time) shifts the organizational focus to enhancing customer lifetime value and encourages resolution over talk time.

Within this framework, those more focused, 1-1 interactions with customers will translate to more effective, personalized customer experiences, which lead to more satisfied and brand-loyal customers. Brand-loyal customers buy more services, make referrals, talk about their experiences on social media, and drive greater business value overall.

Most organizations focus on digital transformation without fundamentally changing operational procedures and KPIs.

Misaligned incentives and performance measures only exacerbate the original problem: a choppy customer experience and consequent dissatisfaction. That’s why it’s crucial for organizations to also adopt new approaches to learning and performance management — helping to transform the modern contact center from a “cost center” to a strategic investment: one that maximizes customer lifetime value and organizational growth.

BIG IDEA #4

Work-at-home constructs and operational flexibility will be the norm

The modern contact center is fully prepared to flex in response to client needs, leveraging people, process, and technology. It is a contact center that is both resilient and redundant, through core capabilities enabled by modern technology.

As a direct consequence of the COVID-19 pandemic, business continuity and operational flexibility has dominated C-Suite and Board level conversations.

Work-at-home is now the default, and not the exception. As a new normal emerges, more work will continue to be migrated to a work-at-home construct — preserving business continuity while enhancing operational flexibility.

The flexible contact center of the future

Times have indeed changed. The need to stay connected digitally with your employees, customers, and partners has become universal. It is therefore incumbent upon governments, both at national and local levels, to invest in the underlying physical and digital infrastructure (internet access, 5G). Companies must also prioritize their investments in remote work infrastructure (device-as-a-service, cloud apps, online collaboration, online training, cybersecurity) to manage operations effectively.
Work-at-home is in Conduent’s DNA.
We’ve offered safe, productive, and secure work-at-home solutions for over 25 years. Today, not much has changed — other than a new sense of urgency to migrate to work-at-home solutions sparked by the global health crisis.

**Scalable:** Being able to scale quickly in response to volume fluctuations is mission critical to managing operations in tough times. Times of crisis inevitably bring higher contact volumes, and the best contact centers have the flexibility to ebb and flow on demand. Finding the right talent with the relevant cultural and language capabilities at an affordable price is key.

**Secure:** As we transition to work-at-home constructs, both physical and information security procedures need to be adapted to ensure peace of mind for customers and employees.

**Geo-versatile:** The ability for employees who are working inside contact centers to quickly pivot to work-at-home roles is critical in times of crisis. But to make that possible, the right technology must be in place for a seamless shift.

**Operationally flexible:** Having a broad geographic reach is crucial to providing human-centric, language-specific support. Location of associates is also important for satisfying certain regulatory requirements, depending on the country of operation.

**HOW CAN YOU TURN THESE BIG IDEAS INTO REALITY?**

The future of customer contact centers is here. But work needs to be done to leverage the right combination of people, processes, and technology to enable the ultimate end-user experiences and better business outcomes.

Conduent can assist you in creating a transformation roadmap for any of your customer experience initiatives — helping you accelerate top line growth and reduce operating costs.

To learn more, visit our [website](http://www.customercontactweekdigital.com) or call us at 1-844-ONE-CNDT.

**ABOUT CONDUENT**

Conduent delivers mission-critical services and solutions on behalf of businesses and governments — creating exceptional outcomes for its clients and the millions of people who count on them. Through people, process and technology, Conduent solutions and services automate workflows, improve efficiencies, reduce costs and enable revenue growth. It’s why most Fortune 100 companies and over 500 government entities depend on Conduent every day to manage their essential interactions and move their operations forward.

Conduent’s differentiated services and solutions improve experiences for millions of people every day, including two-thirds of all insured patients in the U.S., 11 million employees who use its HR Services, and nearly nine million people who travel through toll systems daily. Conduent’s solutions deliver exceptional outcomes for its clients including $17 billion in savings from medical bill review for workers compensation claims, up to 40% efficiency increase in HR operations, and up to 40% improvement in processing costs, while driving higher end-user satisfaction.

Learn more at [www.conduent.com](http://www.conduent.com).
LEADING HEALTHCARE PROVIDER SAVES $11 MILLION A YEAR AND IMMEDIATELY IMPROVES CSAT WITH PREDICTIVE BEHAVIORAL ROUTING

INTRODUCTION

Years ago, leaders at one of the largest healthcare companies developed a strategy that revolved around their members’ experiences. With a simple motto of “healthy customer, healthy business,” the client developed a personalized care experience based on the specific healthcare and benefit needs of every member. What soon became known mainstream as “personalization” enabled this brand to emerge as a leader in their industry and grow its market share. Today, experiences are positioned front-and-center in the care model, and the strategy is paying off. Since 2017, our client has outperformed the SP500 Health Care index by over 50%, and the executive team recognizes Predictive Behavioral Routing as a key technology helping them achieve their strategy.

THE CHALLENGE

This healthcare company’s contact centers receive millions of members’ calls each year. Personalizing each of these millions of interactions would improve their operating costs, as well as member experience. However, the continually changing nature of the healthcare system, along with its increasing complexity, adds considerable strain on healthcare companies to meet their business objectives. They needed a solution that worked quickly, effectively, and produced immediate results on their operating expenses and member experience. As the healthcare industry continues to adapt to new demands, many leaders are looking to use the power of data to drive efficiencies when routing customers to their employees. However, integrating large datasets and complex decision logic into incumbent technology can be an expensive, error-prone, and time-consuming process. Predictive Behavioral Routing removes the burden and risk with unparalleled personalization capabilities, a fully managed service, and a guaranteed return on investment.
Solutions
- Predictive Behavioral Routing
- Predictive AI Models

Vertical
- Healthcare

Customer
- Fortune 100 Publicly-traded Healthcare Company

THE SOLUTIONS

The healthcare company deployed Predictive Behavioral Routing to make smarter connections that improve their bottom-line from the moment it is activated.

Predictive Behavioral Routing
Predictive Behavioral Routing is AI-powered call routing that predicts the best match between customers and agents – for smarter connections and business results. Personalize experiences by instantly pairing customers according to personality and communication style for measurable results on the metrics that matter most – with a performance guarantee.

Better connections, informed by the customer’s preferences, immediately improve Average Handle time (AHT).

Predictive Analysis
To gain greater insight into member experience and further personalize connections, the healthcare provider added AI-powered analytics to calculate a Predictive CSAT score on every call. For immediate improvement to CSAT and NPS, Predictive Behavioral Routing makes the best connection between members and employees using the Predictive CSAT score.

By combining Predictive Behavioral with Predictive CSAT, the healthcare provider realizes immediate improvement to CSAT

RESULTS

Personalizing customers’ experiences with Predictive Behavioral Routing led this top healthcare company to realize over 3x ROI and $11 million a year from reducing operational spending.

Seamless Adaptation For Changing Business Needs
The healthcare provider adapts its call routing strategy for seasonality and simultaneously routes on different metrics across divisions, groups, and skills.

“[Predictive Behavioral Routing and analytics] listen to real-time calls and use natural language processing then to do informed and intelligent routing, to get calls to a customer care specialist right away that’s most skilled to service their need, and that’s an example of a capability that’s helped to improve our Net Promoter score.” — CIO

During open Enrollment, members seek efficiency. The healthcare company responds by optimizing Predictive Behavioral Routing on Average Handle time (AHT). By adapting to business changes and member preferences, they realize an immediate 8% improvement to AHT.

As open Enrollment ramps down, members’ questions gain complexity and require a different strategy to achieve extraordinary member experience. Seamlessly, Predictive Behavioral Routing uses Predictive CSAT to make the best member-employee connection. The shift drives an immediate 5% improvement to CSAT, without any coaching or operational changes.
Immediate CSAT Improvement
Using the Predictive CSAT score from every call, Predictive Behavioral Routing makes the best employee member connection to achieve highest CSAT for the member on the call. This leads to an immediate, industry-differentiating CSAT improvement.

Another key element of our strategy is to simplify processes and improve the member or patient experience by removing the friction points for our members and providers. We have implemented sophisticated analytics to drive predictive call routing, including analytics that matches members with the most appropriate representative based on member communication style and the reason for the call. These initiatives improve customer satisfaction and reduce call transfers 12% [year-over-year].

—CEO, EARNINGS CALL

Immediate Operational Improvement
With a fast implementation on existing technology, Predictive Behavioral Routing drives immediate operational improvement across the healthcare provider’s enterprise.

Another key element of our strategy is to simplify processes and improve the member or patient experience by removing the friction points for our members and providers. We have implemented sophisticated analytics to drive predictive call routing, including analytics that matches members with the most appropriate representative based on member communication style and the reason for the call. These initiatives improve customer satisfaction and reduce call transfers 12% [year-over-year].

—CEO, EARNINGS CALL

Trusted By The Enterprise
Across 10,000 agents at its enterprise, this leading healthcare provider gains insight and improves interactions by combining Predictive Behavioral Routing with Predictive Analytics. Beginning with Predictive Behavioral Routing enabled the healthcare provider to fund its investment in advanced analytics and coaching tools to personalize interactions. Over the past six years, the healthcare provider consistently expanded personalization across its enterprise, using the savings from Predictive Behavioral Routing to invest in their future.

Today, our client’s Predictive Analytics solution identifies over 100 behavioral, personality, process, and experience variables on every call, accounting for insights on millions of hours of calls every year. These insights are immediately included in Predictive Behavioral Routing to predict the best member connection for 10,000 agents.

This healthcare company supports its members with personalization while achieving a 3x ROI and $11 million a year in savings. Seamlessly, Predictive Behavioral Routing and Predictive Analytics improve the healthcare company’s CSAT and operational efficiency to transform personalization into profits.

<table>
<thead>
<tr>
<th>MEMBER QUESTIONS</th>
<th>PBR ROUTING STRATEGY</th>
<th>RESULTS</th>
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<tr>
<td>NOVEMBER – JANUARY</td>
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<td></td>
<td>Complex</td>
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8% Immediate AHT Improvement

Calls up to 120 sec
Shorter than Non-PBR Routed Calls

12 weeks
Improve Metrics across 4 Divisions within 12 Weeks

4 Divisions

20M & counting
Calls Improved by Predictive Behavioral Routing

10,000 Agents
## APPENDIX

**CallMiner**
1. Leveraging Emotion to Improve CX and Elevate Contact Center Performance
2. Listening to the Contact Center to Overcome Pandemic Challenges
3. The CX Pro’s Guide to Speech Analytics
4. How AI Improves Customer Experience
5. Measuring Voice of the Customer

**Mavenir**
1. Mobilizing The Customer Service Experience
2. Delivering Faster Food Orders

**Csg**
1. How To Succeed At Data-Driven Journey Orchestration
2. The Agility Imperative: How Banks’ Contact Centers Can Adapt And Scale To Serve Tomorrow’s Customers

**Calabrio**
1. The State of the Contact Center: Embracing the Evolving World of Work
2. Future of Work: The impact on business, consumers and employees

**unymira**
1. Using Decision Trees For Customer Service
2. Knowledge Base – Business Justification Toolkit

**Radial**
1. Drive Value in Customer Service with the Right Tools and Tech
2. Get to Know Your Customers Day: Hallmarks of a Successful Customer Care Program

**Conduent**
1. Driving High Customer Satisfaction for a Global Logistics Company
2. Reimagine Your Customer Experience through the Digital Lens
1. Healthcare Case Study
2. Financial Services Case Study

1. Designing and Delivering Customer Journeys
2. 6 Killer Applications for Artificial Intelligence in the Customer Engagement Contact Center

1. Infographic
2. PACE Webinar

1. Checklist for Reducing Agent Effort
2. Best Practices for Simple and Effective Remote Training

1. Language Screening Solutions for Contact Centers & BPOs
2. Using Cloud-Based AI Technology for Remote Language Testing

1. Retail Case Study
2. Extraordinary Connections Begin with Trust
# 2020 Editorial Calendar

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<td>Market Study: State of Contact Center Technology</td>
<td>February 2nd, 2020</td>
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<td><strong>April</strong></td>
<td>Market Study: New Standards for Contact Center Performance</td>
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<td>Market Study: Modernizing Service Experiences with AI &amp; Digital</td>
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<td>Market Study: Customer Experience Trends, Challenges &amp; Innovations</td>
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<td>Market Study: Future Of The Contact Center: A Forecast</td>
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<td>CCW Online: State of Contact Center Technology</td>
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<td>Modernizing Service Experiences with AI &amp; Digital</td>
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<td>New Era of Customer Insights &amp; Analytics</td>
<td>November 10-12, 2020</td>
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<td>Future of the Contact Center</td>
<td>December 1st, 2020</td>
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