



2018 CCW Market Study

# PERFORMANCE & METRICS

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## CCW MARKET STUDY: PERFORMANCE

When approaching the topic of customer contact performance, far too many leaders focus on *the definition*. What exactly constitutes good contact center performance?

It is time to move past that conversation.

The issue is not that customer contact professionals have reached a consensus on the definition. It is not that customer demands – and business needs – are done changing.

The problem, rather, stems from the reality that a definitional argument carries little benefit.

Organizations have already deliberated and established their key objectives. Their customers, meanwhile, already have high expectations for the engagement experience.

It makes more sense, therefore, to focus on what it takes to achieve those objectives and meet those expectations.

This report adopts that perspective.

Instead of dwelling on whether organizations have the optimal view of contact center performance, it accepts that they all have a vision that they wish to realize. Citing research, expert commentary, practical advice and a myriad of case studies, it provides numerous pathways for turning their visions into reality.

The report begins by exploring how today's contact centers are evaluating performance. It subsequently moves into a discussion about the key performance challenges facing organizations, before uncovering strategies for achieving paramount customer contact objectives.

After revealing the factors that can cause agent and customer frustration (or delight), it closes with a “practicality guide” highlighting the impact of artificial intelligence, a relationship-minded approach to engagement, customer data security and a unified contact center environment.



## DEMOGRAPHICS & METHODOLOGIES

To collect data for the **Performance & Agents Report**, CCW Digital surveyed customer experience, contact center, marketing, customer care, IT, and operations professionals between December and March 2018.

Example respondent job titles include vice president of support center, senior manager of omnichannel engagement, director of IVR operations, director of call center and customer service, head of client services, vice president of US and international call centers, director of inside sales, director of customer care, senior director of client relations, director of operations, director of customer experience, chief marketing officer, chief executive officer, senior director of global workforce strategy, and senior vice president of member services.

71% of those surveyed directly influence their organizations' customer experience budgets, while 40% either sit in or directly report to the C-suite.

The respondent pool encompasses a wide range of organizations, including a substantial number of large enterprises. 44% of respondent organizations generate over \$1 billion in annual revenue, and 63% have multiple contact center sites. For 56% of organizations, the average contact center site seats over 50 agents.

## ABOUT THE AUTHOR



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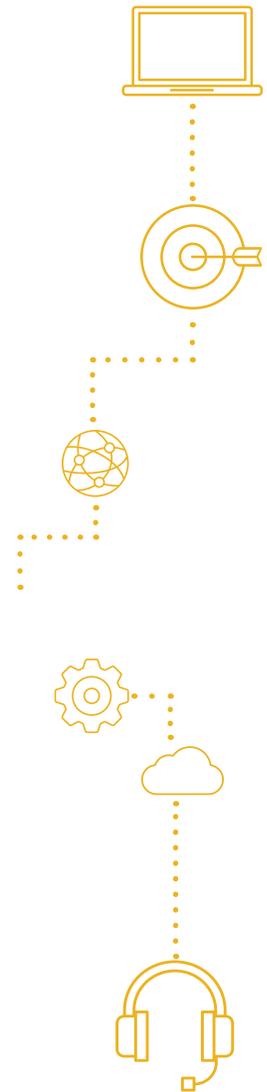
Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology and employee engagement research initiatives for CCW Digital's series of reports.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

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



## KEY FINDINGS

- 1 We may be in an “omnichannel revolution,” but a whopping 63% of organizations are not measuring their ability to honor channel preference.
- 2 Many organizations also lack insight into personalization and effort; fewer than 50% of organizations have metrics for these important customer experience elements.
- 3 Priority metrics for the coming year include CSAT Score, resolution quality and agent satisfaction.
- 4 Roughly three-quarters of organizations believe different contact channels should have their own key performance indicators.
- 5 Organizations do not believe they are struggling when it comes to collaboration between peers, leadership at the supervisor level or compliance monitoring.
- 6 They do, on the other hand, view system integration, knowledge bases and voice of the customer strategy as top priorities for improving performance.
- 7 Reducing customer effort is the #1 CX priority for 2018, and organizations believe customer feedback, agent training and digital engagement are the keys to achieving that objective.
- 8 Disconnected, slow and difficult technologies are the greatest sources of agent frustration.
- 9 Needing to repeat information, difficult self-service and inaccurate or inconsistent information are the greatest sources of customer frustration.
- 10 Organizations believe customer-oriented metrics, one-on-one coaching, and open communication between all seniorities are the hallmarks of a great contact center culture.
- 11 Nearly two-thirds of organizations will leverage automation to improve internal processes.
- 12 There are 5 steps to boosting customer centricity with AI: identifying the needs, establishing the objectives, initiating the technology, bracing for impact and seizing additional opportunities.
- 13 Automated authentication can boost security, reduce customer effort, increase personalization and decrease contact center costs.
- 14 Great contact centers view omnichannel, analytics, workforce optimization and automation as weapons rather than burdens.
- 15 A commitment to building customer relationships is actually quite compatible with an emphasis on contact center performance.



## PERFORMANCE: A MATTER OF MEASUREMENT

The business world is driven by numbers. No matter how admirable and exciting an idea may be in theory, its value is ultimately defined by its impact on results.

The numbers-driven mentality carries particular significance in the world of customer contact. Rhetoric has long been abundant in the contact center. Commitment and action, on the other hand, have been far more elusive. By emphasizing results, customer contact leaders urge themselves – and their fellow stakeholders – to walk the talk.

The customer contact function, moreover, faces enormous stakes. The function's initiatives directly impact the organization's relationship with its customers, which in turn impacts the bottom line. Contact centers cannot settle for devising great ideas; they must perform.

Given this need to perform – and the need to quantify that performance – metrics play an enormous role in revealing (and assessing) contact center strategy. The results an organization chooses to measure reveal what truly matters to that organization.

### What They're Not Measuring

The easiest way to understand the performance management hierarchy is to focus on the omissions. What are organizations *not* measuring?

The failure to measure a particular outcome reflects one or more of the following realities:

- The organization does not care about the outcome.
- The organization does not know how to quantify the outcome.
- The organization does not have a mechanism for collecting the necessary data.

Those realities greatly reduce the prospect of actually *achieving* the outcome. If the organization does not even care about measuring the initiative, it will doubtfully invest heavily into its achievement.

Even if the organization *does* value the outcome in theory, the absence of an associated measurement greatly inhibits its ability to succeed. Without insight into its progress, an organization cannot make the proper adjustments to its strategy or execution. It will not be able to optimize its performance.





For today's organizations, the most common measurement omissions include channel preference (not measured by 63%), personalization (51%) and customer effort (51%).

On the one hand, it is understandable why the three factors are absent from many performance measurement strategies. "Channel preference" is not a conventional "outcome," while personalization and effort may be difficult to track.

On the other hand, these three factors are uniquely important in today's contact center environments. With today representing the "omnichannel revolution" and "era of customer centricity," honoring customer channel preference represents a crucial business imperative. If organizations cannot engage customers where they want to be engaged, they fundamentally cripple their ability to satisfy those customers.

They, moreover, limit their ability to optimize the customer experience journey.

When it comes to bottlenecking customer centricity, failing to measure *personalization* represents an even bigger problem. Organizations, after all, identified "personalization" as the #1 sign of customer centricity in CCW Digital's December 2017 Executive Priorities study. It is a fundamental part of connecting with customers and an essential tenet of competing on the customer experience.

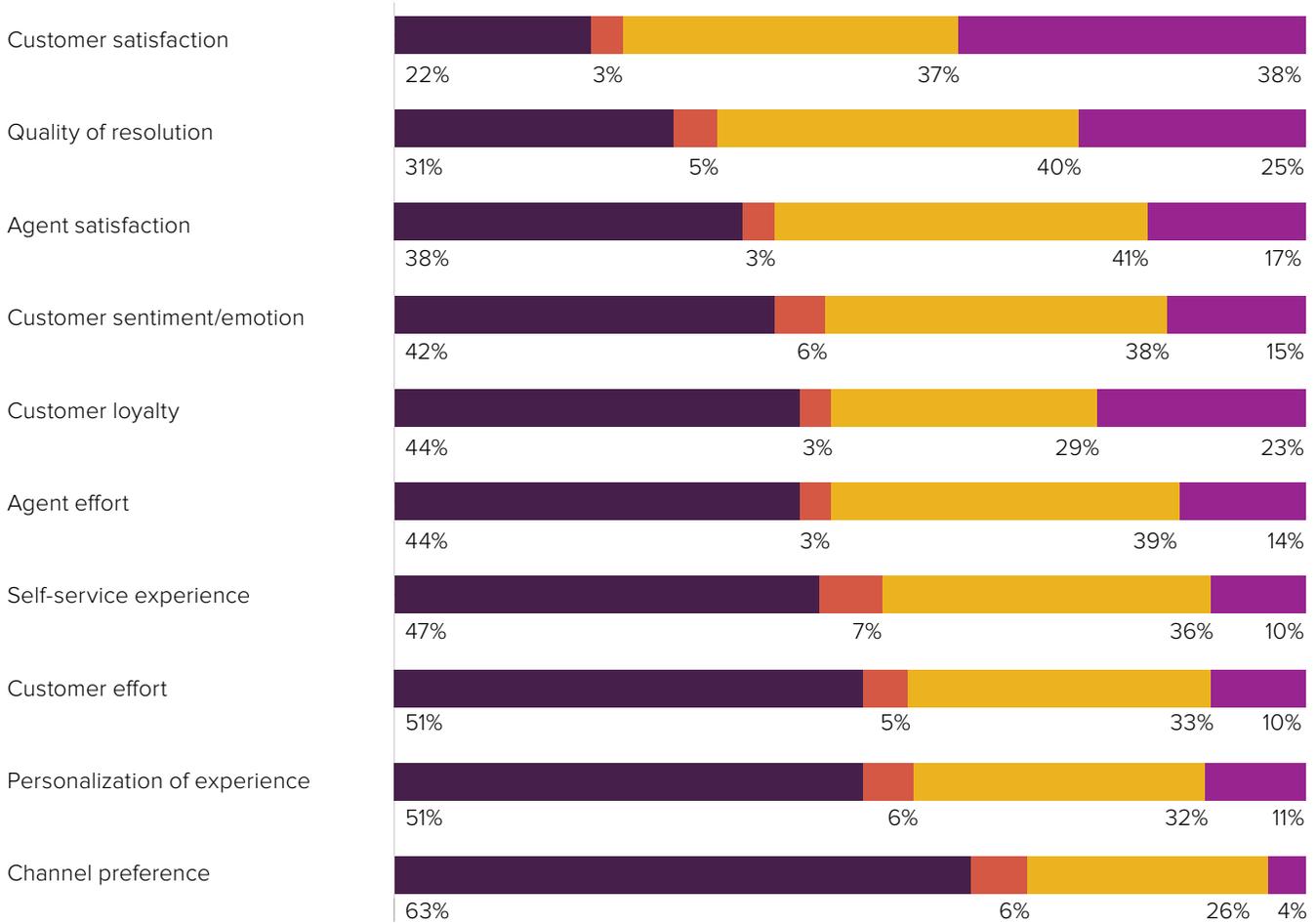
Fewer than half of organizations have insight into whether their interactions are being personalized. Fewer than half of these organizations, as a consequence, can accurately empower systems and agents to deliver tailored, resonant experiences.

The absence of a universal "effort" metric is particularly alarming. "Reducing effort," after all, is not simply an admirable philosophical concept. It is the #1 customer experience initiative for 2018.

Organizations *are* investing in reducing effort yet half have no insight into the effort associated with their experiences. They do not truly know what undue effort their experience is currently causing, which aspects of the journey to address and whether their improvement efforts have been (and will continue to be) successful.

## DOES YOUR CONTACT CENTER/CX FUNCTION HAVE QUANTITATIVE METRICS FOR THE FOLLOWING? ARE THOSE METRICS IMPORTANT?

■ No 
 ■ Yes, but it's not important to us 
 ■ Yes, and it's important 
 ■ Yes, and it's a top priority



### What They're Prioritizing

Customer contact thought leaders have spent the past decade urging organizations to emphasize customer-facing metrics. Given the connection between “happy agents” and “happy customers,” the recommendation also extends to agent-facing metrics.

Organizations seem to be getting the message.

Organizations most commonly identify customer satisfaction, quality of resolution and agent satisfaction as their “priority” metrics for the coming year.

Seventy-five percent say customer satisfaction is a priority metric, while 65% and 58% of businesses assign the priority label to resolution quality and agent satisfaction, respectively.

Unwilling to rebel against the notion of customer centricity, three-quarters of today's businesses value customer satisfaction as an ultimate goal. They know that their customer contact operation is not truly succeeding if it is not sufficiently satisfying customers.

The emphasis on “resolution quality” signifies a value-driven approach to customer contact. Today's organizations are not simply “answering” calls from customers. They are not simply ensuring adherence to a consistent set of procedures. They truly want to deliver what their customers want.

Beyond the impact on customer satisfaction (agent happiness yields customer happiness), emphasizing agent satisfaction conveys a commitment to increasing the agent experience.

The contact center is notorious for high turnover and poor employee engagement, and organizations are evidently looking to overcome those challenges (or at least gain insight into their significance). Measuring agent satisfaction empowers organizations to *increase* agent satisfaction. Increasing agent satisfaction will yield more committed, more invested, more loyal employees who keep their skills and knowledge within the organization for a longer period of time.

While admirable insofar as it reflects a commitment to satisfying customers and agents, the metric hierarchy also uncovers two potential problems:

- Organizations may be setting the bar too low.
- Organizations are not sufficiently measuring the factors that impact satisfaction



Whereas customer satisfaction represents a priority metric for 75% of organizations, customer loyalty represents a priority for only 52%.

Customer loyalty is a more valuable, more big picture extension of customer satisfaction. It reveals the extent to which customers will make repeat purchases – and refrain from switching to competitors.

By not treating the metric as a priority, 48% of businesses are at least partially dismissing that importance. They, moreover, are compromising their ability to generate loyalty.

If there is merit to the idea of measuring satisfaction over loyalty, it is the idea that businesses are focusing on the *driver*. They understand that there is no way to attain loyalty without first satisfying customers.

Unfortunately, businesses are not as enthusiastically thinking about the factors that impact satisfaction – for both agents and customers. Businesses are far less likely to measure (let alone prioritize) quantities like customer effort, agent effort, self-service utilization and channel preference, all of which directly impact satisfaction.

By downplaying (if not ignoring) these factors, organizations limit their ability to identify – and overcome – threats to customer and agent satisfaction.

## Where They're Measuring

The exploration into customer contact center metrics is not merely a question of what organizations are measuring. It also involves the matter of where they are measuring it.

Today's marketplace provides customers with a myriad of channels in which to contact organizations. While few organizations offer engagement in all conceivable channels, virtually none restrict conversations to one channel.

This reality prompts an important strategic question: should organizations use universal or channel-specific metrics to evaluate performance?

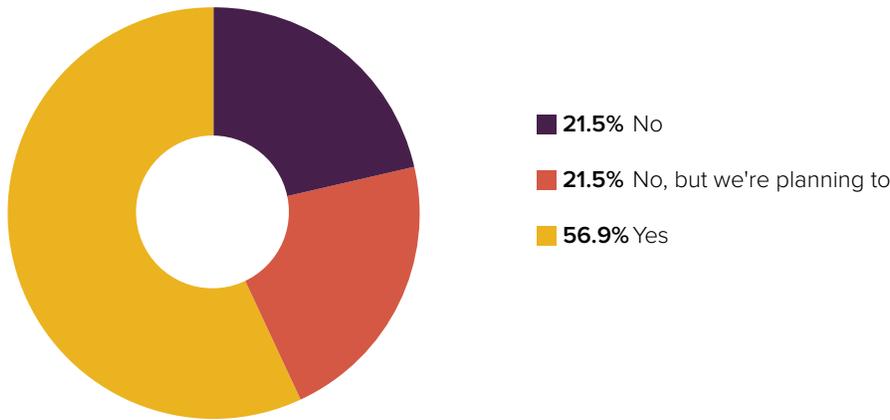
Organizations favor the latter mindset by a considerable margin. Fifty-seven percent say they are currently using channel-specific key performance indicators (KPIs), while another 22% plan to introduce such KPIs in the near future.

This preference for channel-specific KPIs does not necessarily mean organizations are rejecting the notion of “consistency across channels.” They may very well believe that the experience within each channel should reflect the same commitment to customer satisfaction – and boast the same commitment to value and accuracy.

It does, however, reveal that they do not see channel experiences as identical. They believe that phone conversations are fundamentally different from email conversations, which are fundamentally different from chatbot interactions. The performance management strategy must account for those differences.



## DO YOU HAVE DIFFERENT KPIS FOR DIFFERENT CHANNELS? WILL YOU?



## PERFORMANCE: OVERCOMING CHALLENGES

What are the biggest challenges facing a customer contact function?

The answers to that question markedly impact an organization’s performance management strategy.

They reveal which factors are bottlenecking – if not outright inhibiting – performance. Upon doing so, they reveal particularly pressing needs and gaps.

The desire to close these gaps will dictate a contact center’s investments, strategies and action plans.

### Non-Issues

Either way, organizations are content with certain tenets of their operations. And if these aspects are “not broken,” they will doubtfully be fixed.

This list of non-issues includes “agents having trouble collaborating with peers” (only 21% believe it is a problem), poor leadership at the supervisor level (22%), monitoring for compliance (23%), a lack of subject matter expertise (31%) and “wrong metrics” (32%).

Insofar as each of these components factors *heavily* into the success of the customer contact function, organizations better hope they are correctly identifying them as non-issues.

Collaboration ensures agents have seamless access to information and support when they need it. It also contributes to employee satisfaction; a harmonious work environment creates a better agent experience.

Supervisor leadership represents a pivotal component of the operation. If supervisors are not spotting the right problems, delivering the right training and setting the right tone, agents will not perform as needed – and the business will suffer.

The consequences of errant compliance monitoring can be enormous. Inconsistent communication will generally hurt customer sentiment. *Non-compliant* communication will not only hurt customer sentiment but expose the business to significant legal and financial issues.



Customer contact conversations often turn into games of blame and complaint.

The transition is understandable: the stakes of the customer experience are exceedingly high, and it makes sense to scrutinize every aspect of the customer contact function.

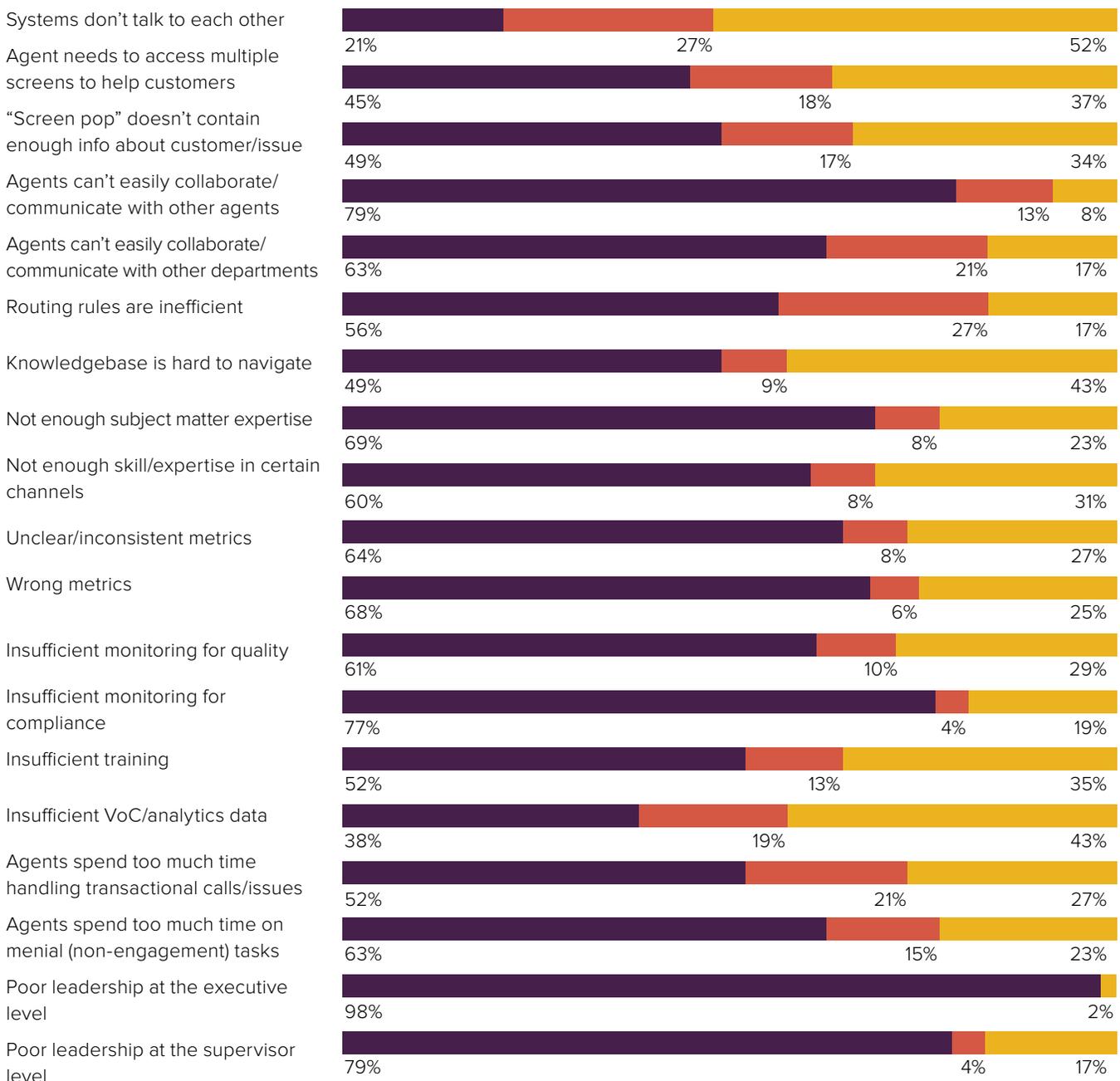
This blame-driven discourse does, however, unfairly downplay the reality that many organizations are excelling in some ways. It also ignores the reality that many organizations *think* they are excelling at some aspects of the customer contact function.

As customers embrace self-service for transactional issues, they will primarily seek agent assistance for complex matters. If organizations lack the expertise to quickly, correctly and sufficiently handle those nuanced challenges, they will squander the opportunity to build lasting customer connections. Worse, they will drive customer dissatisfaction.

Metrics serve as the guiding light for contact center strategy. They quantify the organization’s key objectives, document the extent to which the business is achieving its goals, and reveal the factors that are driving success or failure. If the organization establishes the wrong metrics, it will condition agents and supervisors to prioritize the wrong aspects of the customer experience. Worse, it will give the business a false or misleading perception about the efficacy of its initiatives.

### WHICH OF THE PERFORMANCE BOTTLENECKS WILL YOU FIX THIS YEAR?

■ Not a problem for us ■ A problem, but we won't address this year ■ We'll address this



## Priority Issues

It is safe to assume that organizations will refrain from investing heavily into their non-issues.

It is not, however, a foregone conclusion that organizations will address all performance roadblocks. Few organizations are in position to liberally allocate their resources, money and attention to all known issues.

Many will instead focus on addressing a few priorities. In some cases, these will be the most pressing performance concerns. In others, they will be the issues deemed easiest to resolve.



Either way, these priorities will dictate contact center strategies and investments.

The most widespread performance priority involves ensuring systems can “talk to each other.” A whopping 52% identify disintegrated systems as a problem they will prioritize fixing.

Other priority performance challenges include difficult knowledgebases (43%), insufficient voice of the customer data (43%), agents needing to access multiple screens per customer (37%) and insufficient training (35%).

Three of the key performance focuses include the systems agents use when interacting with customers. For many organizations, these systems are disintegrated, convoluted and difficult to use. As a consequence, agents (and self-service systems) do not have instant access to the data they need to satisfy customers.

To the extent that they can ever access that information in the status quo, they will spend more time and exert more effort acquiring it. Agents will be able to support fewer customers (reducing efficiency), customers will be asked to wait longer (reducing customer satisfaction) and agents will endure more frustration (reducing agent satisfaction).

Improving technology will be for naught, however, if organizations do not have the right data flowing into – and out of – the systems. Nearly one-half of organizations believe they lack the requisite voice of the customer data, which means they can neither properly identify customer needs nor sufficiently empower agents.

While technology plays a pivotal role in driving performance, the contact center remains a “human” function. It still involves agents aiming to make connections with customers.

Agent training is accordingly a paramount strategic concern for organizations, and many do not feel their strategies are sufficient. Whether due to preexisting issues or the concern that they are not properly preparing agents for the impact of digital engagement and automation technology, organizations view training as a performance issue they must urgently address.

## PERFORMANCE: ACHIEVING THE TOP OBJECTIVE

Fixing performance challenges prevents organizations from falling behind.

It does not necessary help organizations get ahead. It is not a surefire way to achieve the most valuable strategic objective.

To truly elevate contact center performance, an organization must face forward. It must identify its ultimate objective and the steps it must take in pursuit of that outcome.

CCW Digital research confirms reducing customer effort as this year’s #1 customer experience objective.

Effort level thus represents an important barometer for evaluating contact center performance. An investigation into performance management strategy, accordingly, must explore the specific ways organizations plan to reduce effort.



Customer feedback surveys represent the most popular mechanism. Over 77% of businesses believe improving their feedback programs will lead to lower-effort experiences.

Improving agent training, the #2 option for reducing effort, is on the docket for 74% of organizations. Other popular efforts for reducing effort include digital engagement (60%), agent feedback (59%) and chatbots/enhanced self-service (56%).

The emphasis on customer feedback is thoroughly unsurprising. By understanding how customers feel about the experiences they are receiving, organizations can identify – and seize – opportunities to reduce effort.

Feedback, interestingly, represents a more popular option than real-time analytics. Since analytics solutions allow organizations to dig deeper into interactions on a real-time basis, the preference is arguably unintuitive.

Customers often identify “difficult IVRs” as sources of customer effort, but poorly trained agents can also be problematic. Agents who ask the wrong questions or share the wrong information can heighten frustration for customers. By identifying agent training as a top priority, 74% of organizations understand the connection.

Agent training may also be on the radar as an extension of other effort-reduction initiatives. As organizations increasingly leverage digital channels and bots for transactional matters, they change the workflow for agents. Agents will be asked to handle more complex,

unique, unpredictable issues – and will need relevant training.

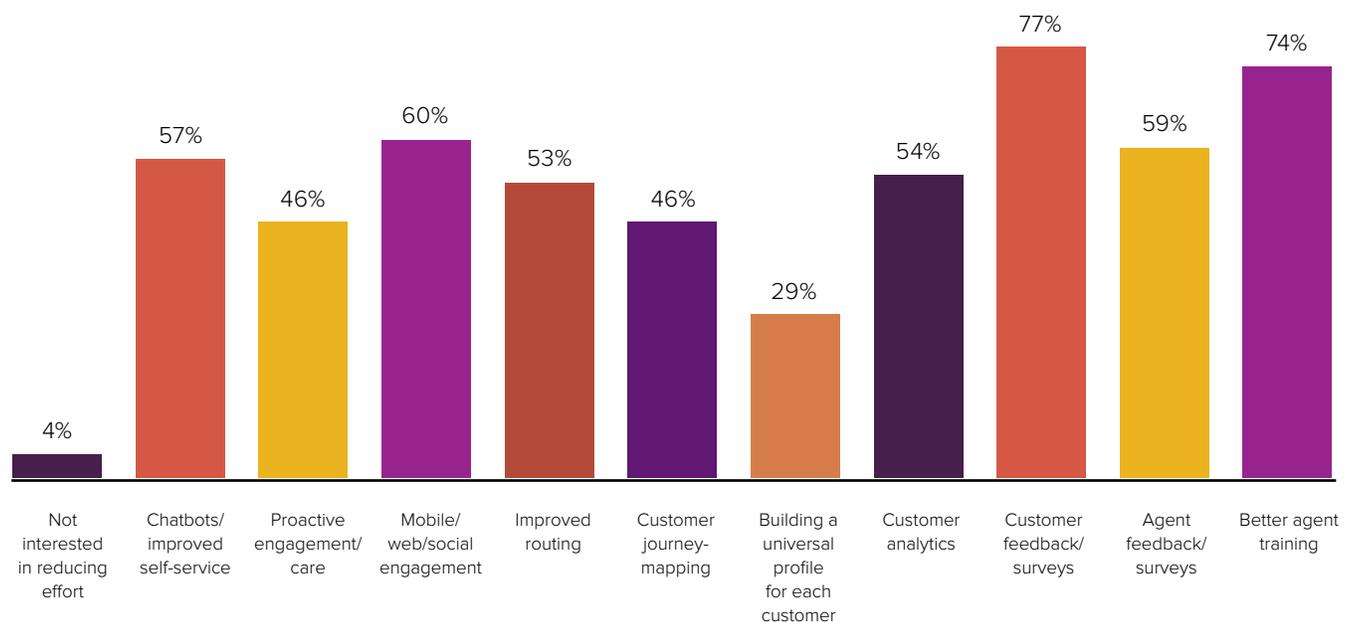
As customers grow to prefer mobile, social and web channels over conventional telephony, digital engagement represents the more convenient channel. Offering – and optimizing – digital channels is thus a logical pathway for reducing effort.

Insofar as they are directly interacting with customers, agents have unique insight into customer experience challenges. They know the key “pain points” and thus represent a great resource for reducing effort. Organizations play to tap into their insights this coming year.

By freeing customers from the burden of waiting on hold, self-service options have long represented an intuitive solution for reducing effort. The problem is that many fare poorly in practice and thus end up complicating the experience for customers.

Organizations will combat this challenge by leveraging chatbots or other enhanced self-service options. Through natural, adaptive, personalized communication, these options allow self-service to live up to its promise of reducing customer effort while maximizing customer satisfaction.

### WHICH OF THE FOLLOWING WILL YOU USE TO REDUCE CUSTOMER EFFORT?



## PERFORMANCE: ELEVATING THE AGENT EXPERIENCE

Agent happiness is famously correlated with customer happiness, the contact center environment markedly impacts employee performance, agent satisfaction represents a priority metric, and elevating the agent experience represents one of the five biggest customer experience priorities for 2018.

Collectively, these points yield a simple reality: one cannot discuss customer contact performance without paying considerable mind to the agent experience.

Indeed, the ability to perform hinges on the ability to understand and remedy employee pain points, while simultaneously building a culture of customer centricity and agent empowerment.

### Understanding Agent Challenges

Broken, inefficient or ineffective contact center systems routinely drive customer complaints.

Disintegrated systems, specifically, represent the #1 source of agent frustration. Over 59% of organizations say they frequently hear complaints about disconnected systems.

Other common sources of agent complaints include slow systems (47%), difficult systems (30%), insufficient training (26%) and insufficient compensation (26%).

The data explains why organizations identify fixing unproductive systems as a top performance priority. Disconnected, unintuitive systems create unhappy

agents. They also bottleneck agent productivity. If an organization truly intends to reduce customer effort and increase customer satisfaction, it has no choice but to remedy this pressing, significant pain point. It must ensure its systems help – rather than hinder – agents from delighting customers.

That directive also extends to training. Insufficient training, which is evidently a commonality in the status quo, leads to agents who are neither optimally productive *nor* optimally unhappy. Improving training is a pivotal step in elevating the agent experience.

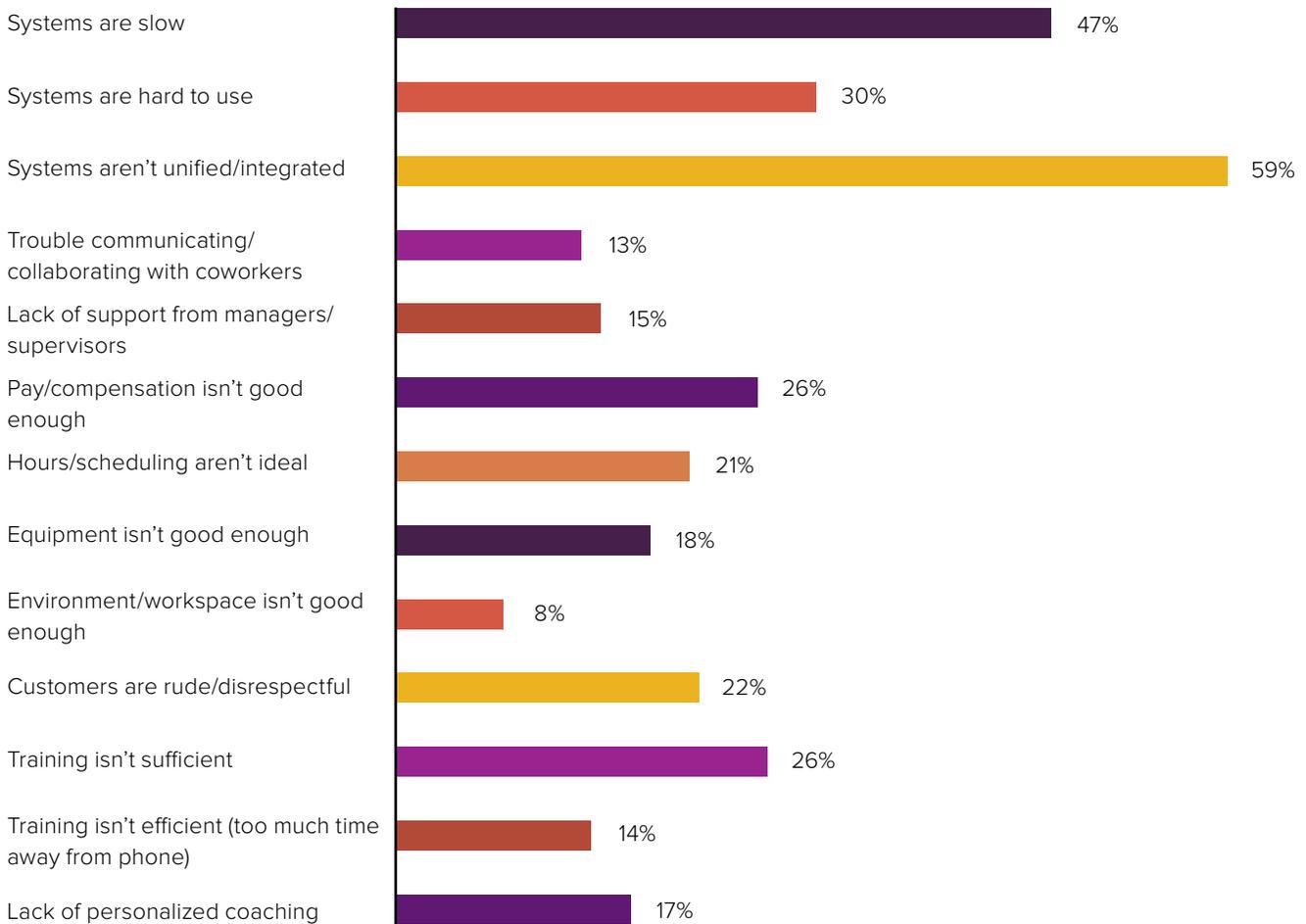
Compensation may not have the same day-to-day impact as poor systems and training, but it clearly weighs on agents. They, no matter how much budget-conscious executives may want to pretend otherwise, care about the salaries they are receiving and the incentives they are earning.

Granted, few organizations are in position to markedly improve agent compensation. All organizations, however, must understand the adverse impact compensation can have on the agent experience. When assessing the personnel budget, performance-centric leaders must account for the *long-term* cost of lower salaries.

All organizations, moreover, must consider introducing enticing perks and incentives into the mix. Knowledge that great performance is rewarding will counteract negativity over base salaries *and* encourage agents to adopt the right behaviors.



## WHICH COMPLAINTS DO YOU FREQUENTLY HEAR FROM YOUR AGENTS?



### Creating a Performance-Centric Culture

When it comes to customer contact strategy, few topics make for a trickier conversation than culture.

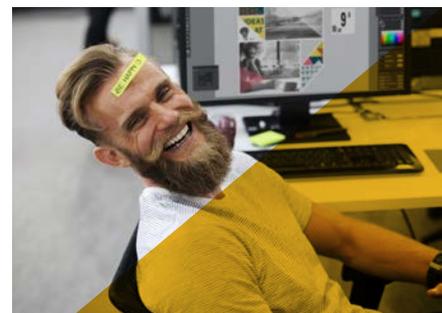
Specifically, thought leaders debate the appropriate balance between “fun” and “productive.” Believing in the value of agent happiness, some instinctively conflate “culture” with iconic workspaces, parties and quirky branding. Other thought leaders, however, question the extent to which those factors actually lead to stronger performance, which is the real goal at the end of the day.

Another key question concerns the extent to which “fun” matters to agents. Agents identify practical issues like broken systems and poor training as their biggest

sources of frustration. If effective systems and great coaching matter more than brightly painted workspaces, then should the latter be more commonly associated with an “agent-centric culture”?

There may not be a simple, singular answer to the culture question. Based on their own budgets and options, customer contact leaders will ultimately establish their own visions for the optimal contact center culture.

Those visions will, however, possess some common elements.

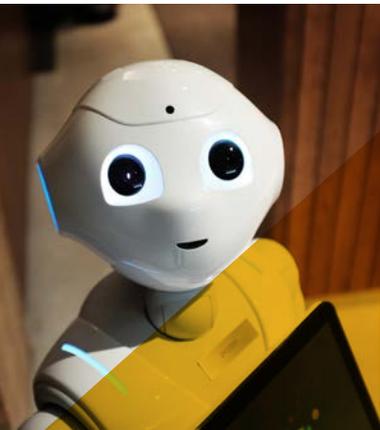


An emphasis on customer-oriented metrics is the most common element. Over 90% of organizations believe such an approach is crucial to a great contact center culture.

Other common elements include one-on-one coaching (88%), open communication between leaders, supervisors and agents (86%), an emphasis on operational metrics (69%), an emphasis on agent collaboration (63%) and permission for agents to make decisions about make goods or unique resolutions (63%).

These universal culture elements check three boxes: customer centricity, communication and strong performance.

By emphasizing customer-oriented metrics and empowering agents to make pro-customer decisions, organizations believe a great contact center culture involves reverence for the customer. Agents must know that they should – and can – do right by customers.



The specific emphasis on customer-oriented *metrics*, however, sends the message that results matter. A great contact center culture does not simply preach a pro-customer philosophy; it commands agents to perform for customers. It compels them to strive for a tangible increase in customer satisfaction.

It also asks them to remain efficient and productive.

Whether because cost remains

a concern – or because quick, efficient performance is actually *correlated* with customer satisfaction – organizations believe great contact center cultures emphasize “operational metrics.”

In the name of performance and agent happiness, great cultures also foster communication and collaboration between employees of all seniorities. They stress one-on-one coaching as a way to make learning more personal, engaging and effective. They also encourage open dialogue between agents, supervisors and leaders to promote the sharing of feedback and the forging of a community.

## Leveraging Automation

Automation is one of the most popular topic within the customer contact community.

It also represents a popular approach for improving agent performance.

Approximately 65% of organizations will focus on using automation to improve agent performance this year. Nearly 14% view automation as a *top priority* for empowering contact center agents, while fewer than 10% will outright ignore automation this year.

Insofar as automation is often sold as a way to help agents “focus on engagement rather than menial” tasks, it is worth noting that organizations do not view wasted time as a grave concern.

Over 82% of businesses say agents spend at least 60% of their days meaningfully engaging with customers. Nearly 24% say agents devote over 80% of their time in such meaningful interactions.

The numbers certainly do not reflect a crisis of inefficiency, yet organizations apparently believe the dynamic can be better. By confirming their emphasis on automation, organizations confirm that they want to open the door for agents to spend even more time engaging.

They may also be confirming their desire to make that engagement more meaningful. Along with quickly performing rote tasks, automation technology can help an organization glean valuable insights from its data – and then communicate those insights to agents. It can help agents make *better* connections and deliver quicker, more personalized resolutions.

Given the dual interest in reducing customer effort and increasing customer satisfaction, automation clearly fits perfectly into the ideal performance strategy.

## TO WHAT EXTENT WILL YOU USE PROCESS AUTOMATION TO IMPROVE AGENT/EMPLOYEE PERFORMANCE THIS YEAR?



- 9.8% Automation is not a focus
- 25.5% Automation is a slight focus
- 27.5% Automation is a solid focus
- 23.5% Automation is a significant focus
- 13.7% Automation is a top priority

## PERFORMANCE: ADDRESSING CUSTOMER COMPLAINTS

When devising a customer contact strategy, it is important to understand the distinction between a “pro-customer” philosophy and a customer-centric philosophy.

A pro-customer approach involves aiming to do right by – and create value for – the customer. A customer-centric ideology, on the other hand, involves delivering the experience the customer is truly demanding.

While both are obviously preferable to making decisions from an internal, operational perspective, the latter represents a more direct pathway to success.

By understanding what customers really want and how customers really feel, an organization can more effectively reduce effort, establish personalization and foster satisfaction.

### Understanding Customer Complaints

To develop a customer-centric experience, an organization must pay considerable attention to customer complaints.

Those complaints underscore what really matters to customers. They also help the organization distinguish between what *seems* wrong and what is *actually* wrong.

Hardly surprising given their issues with fragmented systems, the most popular customer complaint is the need to repeat oneself when moving between channels or agents.

Thirty-seven percent of organizations frequently hear that complaint from their customers.

Other common complaints include difficult self-service platforms (31%), inaccurate and inconsistent information (28%), cost and product issues (28%), and long wait times (25%).

Between its impact on performance, the agent experience and customer satisfaction, system fragmentation is *clearly* a challenge for today’s customer contact functions. Disconnected systems seemingly hurt every facet of the customer experience.

A statistic from the CCW Digital study resoundingly underscores the situation: only 18% of organizations say customers can consistently move between channels without repeating information. Nearly 55% of organizations say their customers never can.

This is supposed to be the age of omnichannel. A frictionless, personalized experience is supposed to be the key indicator of customer centricity. The majority of organizations nonetheless confirm an inability to recognize customers as they move between touch points.



Organizations plan to prioritize chatbots as a strategy for reducing customer effort. In doing so, they will put themselves in position to alleviate the complaint about poor self-service systems.

Automation will also help on the backend. That combination of internal automation technology and stronger integration between systems should address issues with inaccurate and inconsistent information.

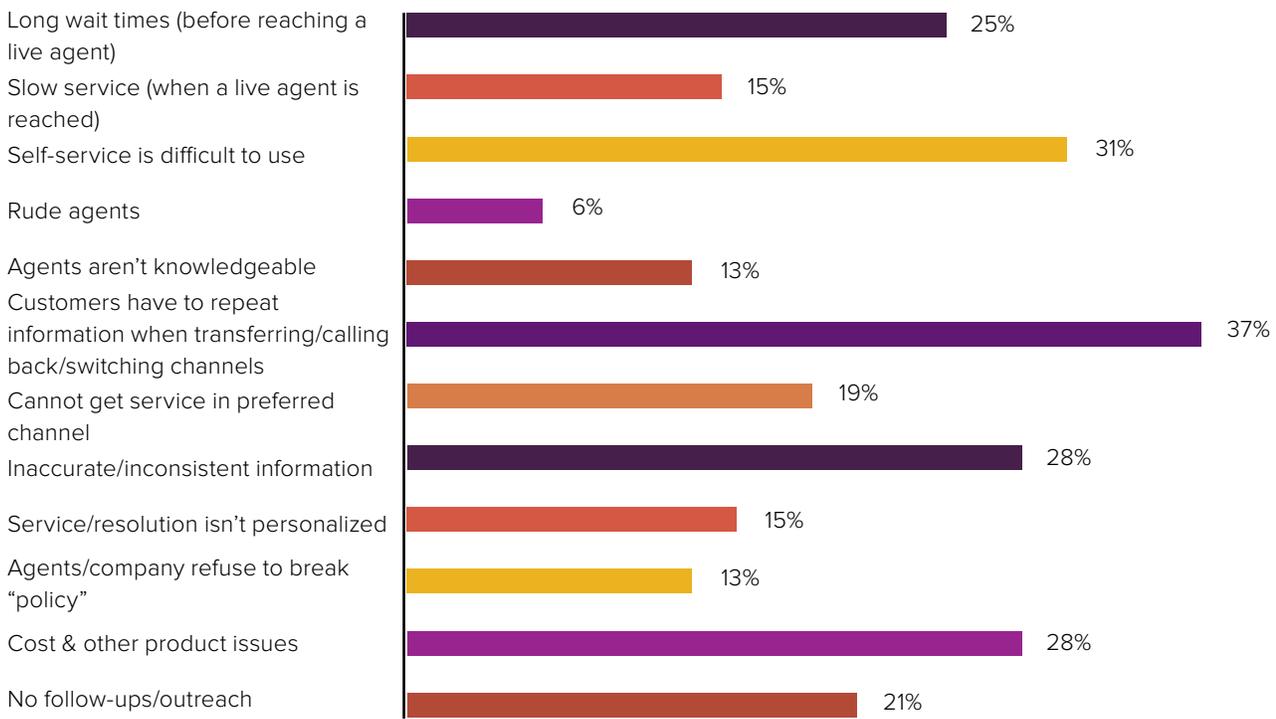
While few customer contact functions can directly address product issues, they can still play an instrumental

role in tackling factors like price and quality. As the link between the organization and its customers, the customer contact function has unique access to customer sentiments and insights. It thus gains valuable feedback, which it can share with other relevant departments and stakeholders.

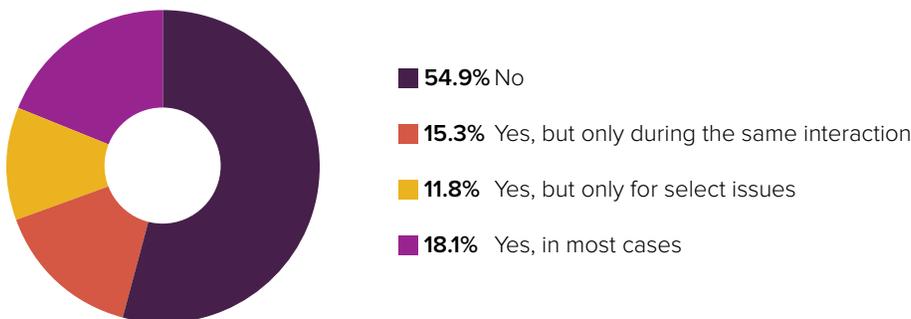
Access to this valuable data, many thought leaders argue, may be the most valuable part of the contact center.

Plans to optimize self-service and improve agent efficiency should directly tackle the wait times concern.

### WHICH COMPLAINTS DO YOU FREQUENTLY HEAR FROM YOUR CUSTOMERS?



### CAN YOUR CUSTOMERS MOVE BETWEEN CHANNELS WITHOUT REPEATING INFORMATION?



# PRACTICALITY GUIDE

Customer experience case studies, expert tips and practical exercises that you can bring back to the office.



# IBM Watson®

## 5 STEPS TO BOOSTING CUSTOMER CENTRICITY WITH AI

Artificial intelligence may be impressive and exciting, but it is no longer a fringe, aspirational concept. Today's organizations are not passively admiring AI from afar – they fully intend to integrate the technology into their customer experiences.

On the one hand, the transition offers validation for the technology. Organizations clearly understand the value.

On the other hand, it also creates a challenge. Now that organizations are actively implementing bots and other AI-driven forms of technology, they are no longer content to marvel over its potential. They fully expect bots to deliver results.

This pressure for results is particularly significant in the contact center function. As the bridge between the business and its customers, the contact center operates with enormous stakes. The contact center, moreover, faces infamous budgetary scrutiny. There is little flexibility for experimentation: every investment is expected to deliver a meaningful return.

Today's bots are definitely up for the challenge. Not merely “cool” pieces of technology, they are immensely functional, practical, customer-centric and results-oriented. They truly can help businesses grow customer satisfaction while improving the bottom line.

“Can” is the key word. Not all bots – and bot initiatives – are equal. To truly deliver results, organizations will have to select the right technology and then embark on a five-step journey.

This guide highlights that journey.

### STEP 1: Identify the Needs and Opportunities

Like all successful technology rollouts, the best AI initiatives begin with identifying the purpose.

What customer demands is your organization failing to meet? Which aspects of the customer experience are broken – and thwarting your success? How can you add value to the customer experience journey? How can you improve contact center performance?

When considering bots, you will want to evaluate those questions through the lens of customer engagement.

- **Customer demands:** Today's customers are demanding fast, frictionless, personalized experiences in channels of their choice. Recently, they have begun to demonstrate an affinity for self-service and text-based interactions. These demands must be top-of-mind when considering bot initiatives.
- **Challenges:** Specific channels – and specific issues – tend to cause the greatest amount of “effort” within the customer experience. You should target these “pain points” when determining how best to implement bots into the journey.

- **Value:** Competing on the customer experience involves more than merely addressing sources of inefficiency and effort. It also involves creating positive value for customers. When implemented correctly, bots can play an invaluable role in this endeavor. They can empower proactive engagement for customers. They can address certain issues more productively than human agents. They can enhance the routing and authentication processes. Before implementing bots, determine what value you wish to create.
- **Performance:** Agents may not be perfect, but they rarely deserve all the blame for poor performance. Their productivity is likely bottlenecked by challenges throughout the customer experience journey. To make the most of your bot investments, you should seize opportunities to empower agent performance.

## STEP 2: Establish the Objectives

After identifying the issues you want the bot to address, you need to develop a framework for assessing its performance.

You need to define clear objectives.

Insofar as bots are commonly used to enhance the self-service experience, relevant short-term objectives may involve reducing customer effort and increasing self-service utilization. If bots are not making the self-service experience markedly easier and more resolute for customers, they are not fulfilling their purpose. They are window-dressing rather than functional tools.

Those leveraging bots for proactive engagement may also want to consider factors like reduction in call volume. Those who uses bots to automate the authentication and routing processes may want to focus on customer sentiment and talk time.

These objectives are, of course, intermediary concerns. Over the long term, the business will want to weigh the impact of bots on end-game results like customer satisfaction and loyalty, contact center cost and revenue.

## STEP 3: Initiate the Bot

After devising the plan and establishing the performance framework, you need to transition from the theoretical into the practical. You need to actually implement the bot.

The best AI-driven solutions may be inherently impressive and intuitive, but implementing bots is never as simple as flipping a switch. You will need to develop a sound, customer-centric implementation plan.

The best plans address several key tenets.

- **Rollout plan.** You will want to develop a strategy whereby you gradually introduce the bot to different customers at different touch points. This methodical strategy helps you assess initial results and address unexpected challenges.
- **Customer education.** Most customers understand the idea of self-service, but not all have experience with “conversational” bots. You will want to devise a plan for creating comfort and familiarity. Bots cannot drive satisfaction if customers feel uneasy about using them!
- **Data conditioning.** While bots are capable of learning, they should not be starting from scratch. It is essential to program them with an initial set of knowledge – and rules – related to the business, its customers and its industry. From industry jargon, to policies, to common customer issues, bots will need to be armed with context.

*“Organizations must consolidate the data they want the bot to learn so that they can create and train the best bot that fits their business,”* recommends the IBM Watson team.

- **Integration.** Bots are not a standalone engagement tool; they are being inserted into an existing experience journey. Your systems must support their integration into the journey. On the frontend, customers should be able to seamlessly move between bots and other channels. On the backend, the bot should be continuously communicating with CRM, knowledge bases and other contact center systems.
- **Monitoring.** To the extent that bots are supposed to increase engagement quality and drive results, performance and quality monitoring are essential. You must develop a technological framework for capturing results and a strategic framework for analyzing the performance insights.

#### STEP 4: Brace for Impact

If implemented correctly, the typical bot will improve the self-service and escalation experiences for customers. It will also improve contact center performance.

The impact goes far beyond those qualitative and quantitative measures of quality, however.

By creating a more valuable self-service experience, bots fundamentally affect contact center workflow. Whether proactively or reactively, the bots will help customers resolve more transactional matters on their own. The issues that reach agents will, accordingly, be of an increasingly complex nature. In order to transition from “support representatives” into “engagement agents,” these employees may need to cultivate a new skillset.

Agents, moreover, will need to learn how to appropriately manage escalations from bots. Since bots are more conversational than conventional self-service channels, customers will have a greater expectation of “recognition” when reaching the live agent. If agents are not equipped to instantly turn “bot data” into “meaningful conversation,” they will undermine the experience.

As the workflow dynamic changes, the organization must understand the impact on metrics. Factors like channel preference and self-service abandonment become more relevant now that organizations are working to optimize digital channels. You will also want to rethink metrics related to employee efficiency. If agents begin to focus more intently on deep, complex issues, their handle time may rise as their call count shrinks.

From a big picture perspective, it is important to remember that artificial intelligence represents a new “function” for the business. Just as major contact channels have dedicated experts monitoring performance and developing strategy, bots will require leaders who can constantly optimize their usage. How will the bots learn? How will upgrades and expansions be handled? Whether in-house, by a partner or with a combination of both, these questions must be answered.

#### STEP 5: Seize All Opportunities

On the one hand, it is important to identify a clear purpose before implementing an artificial intelligence solution. In order to optimally implement the solution and most accurately measure results, you must understand what you are trying to achieve.

On the other hand, it is important not to entirely define AI by a singular objective. The best artificial intelligence solutions offer multiple benefits, and performance-centric businesses position themselves to reap all possible rewards.

Bots, as an example, represent a tremendous tool for acquiring customer data. By *conversing* with customers, bots gain access to valuable customer feedback as well as insights about intent and sentiment. Whereas static self-service tools theoretically help organizations support their customers, bots help understand them.

*“[Bots] can help business better understand their customers on a deeper level thus guiding much larger, overarching decisions,”* says the IBM Watson team.

While organizations are well-versed on the value of internal automation, it is important to note that frontend bots can *also* serve as a valuable resource for agents.

By collecting information at the onset of the interaction, bots can help route customers to the appropriate agent. They can concurrently provide the agent with relevant context for the issue.

They can also serve as a form of “A/B testing” for engaging with customers. If bots routinely struggle to address certain issues, agents can make sure to avoid that language when conversing with customers. Workflow managers can also predict which issues are more likely to result in an escalation to the voice channel.

*“Train agents to be true subject matter experts knowing that they can still rely on bots to help enhance their recommendations to clients,”* advises the IBM Watson team.

The ultimate takeaway is that the impact of bots goes far beyond making engagement more frictionless, efficient and proactive. You, accordingly, should make sure to consider the *entire* array of opportunities – and what those opportunities mean for other facets of your operation – when considering an AI rollout.

## Intelligent Applications of AI

### The Challenge

To provide anywhere, anytime service, Staples sought to remove the friction of ordering from its stores and websites and instead use its Easy Button to become part of the customer's daily routine.

### The Process

Using IBM® Watson™ APIs, the company transformed its Easy Button into a cognitive ordering ecosystem that customers can use to order supplies from a variety of devices using voice, text or email.

### The Results

**Higher order frequency:** expected by embedding the ordering process into office managers' work routine.

**Increased order sizes:** anticipated by enabling customers to order using voice, text and email across a variety of devices.

**Improved service scores:** predicted by facilitating anywhere, anytime service across channels.

### The Challenge

To operate more efficiently, foster greater innovation, and go to market with new features and products more quickly, UBank wanted to explore a platform as a service (PaaS) cloud development model.

### The Process

UBank launched new initiatives in an IBM Cloud Platform environment, including a virtual assistant that incorporates IBM Watson technology to support the bank's online home loan application.

### The Results

**Speeds time to market:** with an IBM Cloud Platform framework that streamlines development and empowers product teams.

**Supports innovation:** with cloud-based IBM development resources that are quick, easy and cost-effective to deploy.

**Collaborates strategically:** with IBM in a highly productive relationship built on a shared vision of UBank's business objectives.



## SECURING GREATER EFFICIENCY & CUSTOMER SATISFACTION

When it comes to matters of efficiency and security, customers and businesses both aspire to have their cake and eat it too.

Customers may expect fast, frictionless experiences, but they are not at all willing to sacrifice security.

Organizations, meanwhile, demand efficiency from their contact centers. They cannot, however, relax authentication measures in the name of cutting costs.

At face value, this landscape seems problematic. Customers do not want to compromise, and businesses cannot afford to compromise. In a marketplace ultimately governed by practicality and tight budgets, can a contact center possibly accommodate this reality?

Yes, it in fact can.

Whereas efficiency and security may seem like oppositional concepts on the surface, they tend to be correlated in reality.

Poor authentication measures tend to be a significant source of effort – and frustration – for customers. They stall the engagement journey and, ultimately, produce dissatisfaction.

Ineffective – or lacking – authentication measures, meanwhile, hinder the business' ability to perform productively. The longer it takes to identify the customers, the longer it takes to begin resolving the issue (and completing the call).

If approached in the correct manner, efforts to reduce effort, increase efficiency and maximize security can go hand-in-hand.

This guide will illustrate that correct approach.

### Understanding the Security Challenge

Authentication is a centerpiece of today's engagement experience.

For starters, it empowers connections. If an organization cannot successfully identify its customers, it has no chance of tailoring the experience to their personalities and needs. It has no chance of transforming from an entity that sells a product into one that meaningfully engages with customers.

Authentication, moreover, represents an absolute necessity for doing business in today's marketplace. Customers – especially in the wake of recent scandals involving fraud and data breaches – are very protective of their personal information. They want confirmation that no one has unauthorized access to their accounts. They also want to know that data they have provided to a brand is protected and not being used for unsavory purposes.

If an organization cannot provide these customers with a sense of security, it stands no chance of winning their long-term business.

Poor authentication is, of course, not merely an issue of perception.

If the inadequate security measures lead to account takeovers, the organization can face enormous costs in the form of lost business, liability and compliance issues.

Organizations, understandably, take authentication very seriously.

The problem is that the measures they employ come at the expense of the customer experience. Knowledge-based authentication, one of the most common measures, can actually exacerbate security challenges.

Ineffective authentication measures, ultimately, yield several key challenges:

#### **Burden for customers:**

*“When customers call contact centers, they just want to have their questions answered or their problems solved without needlessly being bogged down by cumbersome authentication,”* says Pat Cox of TRUSTID.

While authentication is theoretically being done to help customers, it ends up hurting their experience. It requires them to spend unnecessary time – and exert unnecessary effort – in pursuit of their resolution.

#### **Sends an “anti-customer” message:**

“Do they see me as a person or as a number” is one of the most popular tests for customer centricity. By subjecting customers to a convoluted authentication process on each call, organizations appear to fail that test.

Customers may value security, but they do not care about the logistics associated with an authentication process. They simply know what they are experiencing – a brand asking them to confirm information they have already provided on numerous occasions. They see a brand that does not care enough about its customers to recognize them.

#### **Restricts the experience:**

If an organization cannot authenticate its customers before they speak to a live agent, it cannot offer a robust self-service experience. Self-service functions will be limited to “only those that less-trusted callers should have,” notes Cox.

Banking customers, as an example, cannot perform simple (yet high-stakes) tasks like resetting PINs or changing contact details on their own. They must wait for assistance from a live voice agent.

In ignoring their preference for self-service and requiring them to endure more waiting and

*“When customers call contact centers, they just want to have their questions answered or their problems solved without needlessly being bogged down by cumbersome authentication,”* says Pat Cox of **TrustID**.

*“Functioning as an interrogator is also one of the worst parts of a contact center employee’s job,” declares Cox.*

exert more effort, these organizations will reduce customer satisfaction.

#### **Inefficiency:**

Not simply wearisome for customers, “interrogation” calls are also problematic for agents. They prolong the call process, thus reducing agent productivity. Their rote, repetitive nature also negatively impacts agent satisfaction.

“Functioning as a interrogator is also one of the worst parts of a contact center employee’s job,” declares Cox.

#### **Invites fraud:**

In an effort to improve security, knowledge-based authentication can actually foster fraud.

Knowledge-based authentication rests entirely on the identification questions. One who gains access to the answers can, accordingly, pose as the customer when interacting with a business.

Making matters worse, criminals have become highly adept at socially engineering agents to give them the information they need to takeover accounts.

By relying exclusively on the knowledge-based approach, organizations have no way to prevent this form of fraudulent behavior.

## **Security as a Pathway to Improvement**

The aforementioned challenges, it should be noted, are not inherent consequences of authentication.

They are consequences of a poor, ineffective approach to authentication.

By improving the approach, an organization can address each of the five challenges while building significant, positive value. It can ultimately create a customer experience that is more satisfying for customers, more efficient for the business and more secure for every entity involved.

This value-driven approach to security includes several key elements.



*“Ultimately, TRUSTID allows customer contact centers to automatically authenticate callers before their calls are answered,” says Cox. “Using a patented approach that analyzes calls within the global telephone network, TRUSTID’s pre-answer caller authentication enables companies to significantly reduce customer identity interrogation and thus decrease contact center costs.”*

*“That makes this a win-win for CX, operations and finance by decreasing contact center costs, improving the customer experience and focusing more fraud-detection resources on true threats.”*

**Rethink the customer experience journey:** In the status quo, organizations are either hurting the efficiency of the experience by adding too many layers of authentication or hurting the value of the experience by restricting “secure” interactions to lengthy voice conversations.

In reality, organizations do not need to select either option.

The first step involves identifying the issues that truly require authentication. Customers should be able to handle all other issues with self-service, in low-touch digital channels or in quick, pointed conversations with agents. Customers will benefit from the easier process, while agents will be able to handle a greater number of issues.

**Adopt an automated authentication process:** Automation is a hot topic in the customer contact community with good reason: it can truly enhance certain aspects of the engagement journey.

The authentication process is one such beneficiary.

Built on the notion that a phone is an inherently valuable authentication device (because a caller must physically possess it, like a key), TRUSTID’s solution converts phones into “unique ownership factor identity tokens.”

At the onset of the call, the solution ensures the inbound call is coming from a specific, physical, authentic device – and not being spoofed, duplicated or virtualized.

*“Ultimately, TRUSTID allows customer contact centers to automatically authenticate callers before their calls are answered,” says Cox. “Using a patented approach that analyzes calls within the global telephone network, TRUSTID’s pre-answer caller authentication enables companies to significantly reduce customer identity interrogation and thus decrease contact center costs.”*

*“That makes this a win-win for CX, operations and finance by decreasing contact center costs, improving the customer experience and focusing more fraud-detection resources on true threats.”*

Indeed, this automated approach carries numerous benefits.

- **It reduces customer effort.** With much of the authentication process handled automatically, the customer no longer faces the burden of answering redundant questions at the start of the call. They can jump right into the conversation (or self-service process).
- **It increases personalization.** With confidence about the caller’s identity, the agent can begin delivering warm, tailored communication from the onset of the call.
- **It improves agent performance and satisfaction.** Agents can spend less time asking basic questions and more time actually resolving problems – and connecting with customers.

*“Before a call is even answered, verify that it’s coming from the actual, trustworthy phone and tag it as valid,” advises Cox. “In parallel, reduce the use of KBA to something easy for customers to provide in IVRs, such as a numeric value. This approach will provide a more secure authentication solution and better customer experience.”*

- **It optimizes security workflow.** “In many cases, TRUSTID authentication can authenticate a majority of callers,” says Cox. “[This means] that the fraud fighting efforts can be focused on the small minority of other callers.”
- **It directly improves fraud detection.** In addition to freeing more resources to combat fraud, the TRUSTID process directly increases security. The automated authentication provides an accurate, initial layer of security. When paired with a basic, non-intrusive question, the process becomes a secure, two-step, efficient way to confirm caller identity.

While this technically instantly improves the authentication process, organizations will still want to consider two key factors.

They will first want to determine the proper synergy between the automated authentication process and manual questioning. While the solution eliminates the need for a convoluted knowledge-based process, it still requires the organization to collect *some* additional data from the customer. The organization will want to consider what data to collect and when and how to collect it. If done right, the customer will feel very secure about the interaction, yet unbothered by the associated security process.

*“Before a call is even answered, verify that it is coming from the actual, trustworthy phone and tag it as valid,” advises Cox. “In parallel, reduce the use of KBA to something easy for customers to provide in IVRs, such as a numeric value. This approach will provide a more secure authentication solution and better customer experience.”*

Confident in the authentication process, the organization can then begin to incorporate higher-stakes engagement into self-service and low-touch channels.

“In banking for example, money transfers, PIN resets, and even international travel notifications become options when you can trust your callers,” reveals Cox.

**Go beyond authentication:** Inefficient authentication measures subject customers to a slow, frustrating process. Worse, they do not even provide *value* in exchange for that burden. Organizations strictly use the authentication process to secure calls, which is a requirement – rather than a bonus – for today’s customers.

Customer-centric organizations escape this unfortunate situation. They use authentication as an *opportunity* to enhance the experience. Specifically, they use their identification of a given customer to create a personalized, contextually relevant experience with more self-service capabilities.

They turn the burden of authentication into a positive for their customers. Better connections – and increased loyalty – emerge as a result.

## Results You Can Trust

Security, obviously, is not a topic with which to take chances. No matter how sound the logic and enticing the theoretical benefits, overhauling the customer authentication strategy can be intimidating.

It is nonetheless worth pursuing. It is also a step many organizations have taken.

These organizations deal with high-stakes interactions and high-value customers and jeopardized neither in their pursuit of a better approach to security.

They have also enjoyed real, tangible benefits, proving that the aforementioned advantages are not merely theoretical.

Several examples highlighted below. These examples should ultimately serve as a call-to-action: if you want to reduce customer effort, elevate personalization, increase operational efficiency and heighten security, you will want to consider adopting the wisdom shared in this guide.



### Company

Top 10 U.S. Bank



### Challenge

Resolving callers' issues faster without identify interrogation.



### Solution

"The last thing an upset caller wants is to answer five authentication questions before getting help. They expect us to know who they are. Thanks to TRUSTID, we know the customer is calling from one of their numbers so we can optimize their experience." –SVP, Top 10 U.S. Bank

TRUSTID authenticates all callers automatically, instantly and invisibly before their call is answered. These trusted callers get help faster, while suspicious callers get routed to forewarned staff. By quickly and strongly authenticating callers it's easy to create a Trusted Caller Flow™ solution that minimizes knowledge-based authentication, increases IVR containment, lavishes callers with self-service options and allows agents to move quickly into problem solving mode instead of identity-interrogating callers.



### Company

Top 10 U.S. Bank



### Challenge

Increase IVR utilization (and reduce call volume for agents)



### Solution

"With TRUSTID, we've seen 5-10% fewer calls go to our agents. When a recent internal maintenance event interrupted our use of TRUSTID, our authentication rates dropped, leading to a 10-15% increase in calls to agents on deposit accounts, and 6% more calls for credit agents." – SVP, Top 10 U.S. Bank

The largest authentication expense comes from people. They add risk, time and cost to your authentication process. Our pre-answer caller authentication removes people from the equation. That shaves 30-90 seconds off of every incoming call, increases IVR self-service and quickly drives cost savings into the millions.

**Company**

Large Credit Card Company

**Challenge**

Inflated fraud costs by poor authentication.

**Solution**

“TRUSTID helps us remove trusted callers from the fraud queue. That’s huge for fraud. The lower the ratio of good calls to fraudulent ones, the higher the ROI for our fraud-fighting efforts.” – Fraud Technology Executive, Large Credit Card Company

By automatically and invisibly authenticating callers’ identities, TRUSTID removes trusted callers from the client’s fraud efforts. This increases the ROI on their fraud-fighting investments and eliminates false positives. And by automating the authentication of trusted callers, our client’s agents focus better when they have to authenticate unvalidated callers manually.



## 4 CUSTOMER CONTACT BURDENS YOU CAN TURN INTO ADVANTAGES

Understandably, the customer contact landscape may seem immensely daunting.

Organizations – many of which were *already* struggling to meet customer demands – are facing a plethora of new challenges. They are being asked to consider factors like customer effort. They are being compelled to emphasize “connections” rather than transactions. They are being urged to implement automated technology like bots into their engagement journeys. They are being pressured to not only drive performance but create agent happiness.

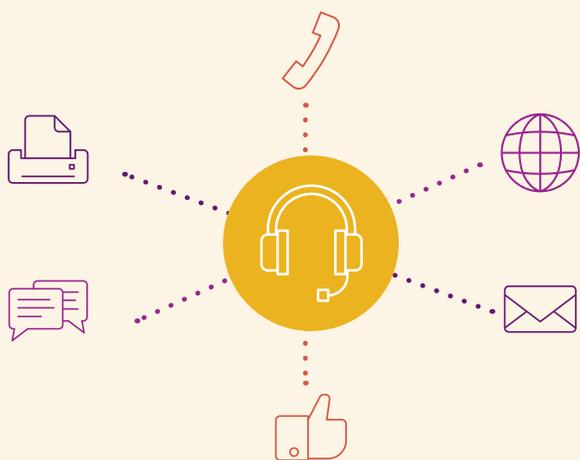
Making matters more intimidating, customers are demanding these elevated experiences in all contact channels. Business stakeholders, meanwhile, are expecting contact center leaders to meet these heightened expectations within the confines of tight budgets.

Organizations do not, however, need to fear this new customer experience normal.

With a combination of innovative technology and astute strategy, organizations can completely flip the script.

They can transform omnichannel engagement, analytics, workforce management and automation from burdens into opportunities. This guide explores that invaluable transformation process.

### The Omnichannel Opportunity



Customer contact center leaders differ on the precise definition of “omnichannel.” Nearly all, however, agree that it involves creating a unified experience across all contact channels. Customers should be able to move between channels without delay or undue effort.

On the surface, that represents an incredible burden for organizations. Multichannel – engaging with customers in various contact channels – was challenging enough. Organizations must now go one step further – and ensure customers (and their data) can move seamlessly between those channels.

The typical contact center is not equipped for this task. The CCW Digital report identifies disintegration between systems as the leading challenge facing organizations. Organizations, as a consequence, cannot consistently track customers across channels. More than half, in fact, reveal that customers *always* have to repeat information when moving between touch points.

Connectivity, it should be noted, only represents one step toward the omnichannel revolution. Once the channels are connected, the organization must begin delivering a consistent experience *in* all channels. It must be able to deliver a personalized, satisfying experience wherever the customer chooses to connect.

Developing the capability to deliver an omnichannel experience, indeed, seems like a tall order. It is also a very worthwhile one.

For starters, a truly omnichannel business is capable of engaging customers in their preferred channels. In today's era of customer centricity, one in which the customer experience represents the definitive brand differentiator, honoring channel preference is incredibly valuable.

An omnichannel framework also allows the organization to deliver the best possible experience within each of those channels. By ensuring customer data can flow between all channels, the organization can maximize personalization and minimize effort. The agent (or self-service system) will be able to quickly tailor the experience without asking the customer to repeat information or wait on hold.

Not merely valuable from a customer-facing standpoint, an omnichannel environment also boosts operational efficiency. By distributing volume across different media (including low-touch and self-service channels), the environment ensures agents can spend most of their time meaningfully engaging with customers. By giving agents access to a 360-degree customer view, the framework helps agents make the best decisions as quickly as possible.

*"Agents need to be able to see the customer progression through the different channels in order to best address their needs,"* says Rich Correia of NICE.

Omnichannel is not a challenge. It is a *solution* to the challenge of needing to manage call volume while cost-efficiently delivering a more valuable experience for customers.

### Recommendations:

- **Ensure your contact center environment encompasses all contact channels.** All agents – and all systems – should have an instant view of all touch points.
- **Manage contact volume on an “omnichannel” basis.** Instead of evaluating call volume, chat volume and self-service volume separately, view them all as “interaction volume.” Make workflow decisions from that holistic view.
- **Establish seamless omnichannel routing capabilities.** Customers (and data) should not be “locked” in the channel – they should flow seamlessly between channels.
- **Train agents** to either engage in multiple channels or handle escalations from different channels.

### The Analytics Opportunity

While analytics may not seem like an overt “demand” in the vein of omnichannel, it still represents a challenge for contact centers.

It represents a call for them to ensure people, processes and technology are capable of collecting, processing, analyzing and reporting data. Data comes from a myriad of sources in today's omnichannel world, and organizations face the task of identifying and acting on the insights that really matter.

This task is nonetheless best viewed as an opportunity. And insofar as modern technology greatly simplifies the endeavor, the barrier to seizing that opportunity is not even a significant one.

With effort representing a top concern for both customers and agents, it is important to understand which aspects of the journey are causing “pain.” A robust approach to analytics helps organizations identify the factors that drive slowdowns, dissatisfaction and outright abandonment. Using that information, the organization can modify its training, redesign its journeys and appropriately initiate bots.

Valuable analytics solutions also give organizations insight into customer sentiment and intent. Insofar as an absence of complaints is not the same as a surplus of loyalty, sentiment data is useful for determining how customers really feel about the experience.

Intent helps an organization understand the “why” behind the interaction. This form of insight helps the organization optimize the journey while empowering predictive and proactive engagement.

In addition to providing customer insights, analytics helps empower performance. By revealing issues with processes, specific issues or specific agents, analytics solutions enable organizations to make necessary operational improvements. From experience design, to training, to technology investments, the data helps organizations navigate the challenging sea of contact center strategy.

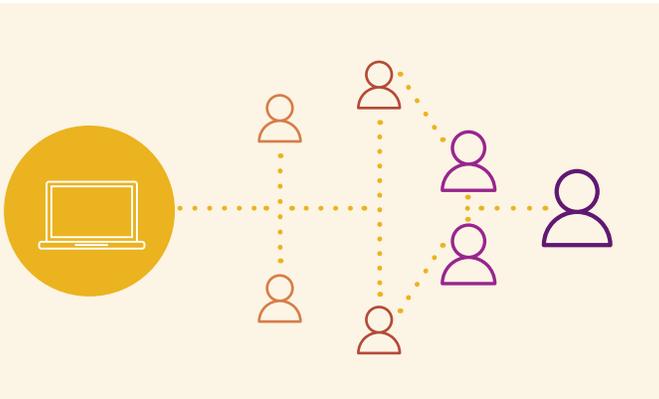
*“The analysis has to show current trends and deviations and subsequent actions that need to take place to improve, impact and/or reverse the trajectory,”* says Correia.

### Recommendations:

- **Set key objectives for your customer experience.** If you do not know what you are trying to achieve, you cannot determine which data to collect and utilize.
- **Develop a keen understanding of your customer journey.** Before you can determine where to collect data, you must identify and prioritize all direct and indirect customer touch points.
- **Mine insights from digital touch points.** They may not involve lengthy conversations, but digital interactions can say a great deal.
- **Emphasize intent and sentiment.** In order to optimize the contact center, you need to know why customers are engaging – and how they really feel about what it is happening.
- **Ensure the data is integrated.** A unified contact center environment ensures data is collected from – and accessible at – each touch point.
- **Automate the data analysis process.** Manual reporting is slow, inefficient and insufficient. Automation technology helps a business gain instant access to the most actionable insights.

*“Leverage automated analysis to spot correlations, trends, and deviations, and propose the next steps, so that quicker and impactful decisions can be made,”* advises Correia.

## The Workforce Management Opportunity



The contact center may use an ample amount of technology, but it very much remains a “people function.” Whether directly engaging with customers, managing those agents who directly engage or determining how best to optimize technology, employees dictate the success of the contact center.

When addressing the “people” element, organizations will need to consider three factors:

- **Ensuring employees are performing as productively as possible**
- **Promoting a commitment to customer centricity**
- **Creating the best possible agent experience**

The challenge of reconciling those three factors may be daunting. Can an organization drive its employees to engage efficiently without inhibiting their ability to meaningfully connect with customers? Can an organization stress performance without hurting the workplace experience?

The answer to both questions is a resounding yes. Stressing agent performance is actually a surefire way to boost the agent and customer experiences.

Poor training, convoluted desktops and improper volume management -- the factors that inhibit agent productivity -- are often the same factors that thwart customer connections. Indeed, unified workforce optimization is not about choosing between efficiency and efficacy. It is about securing both.

By unifying front-end and back-office tasks, the organization can optimize workflow and foster collaboration.

A singular approach to workforce management will drive meaningful performance improvements. The organization will have clearer insight into the particular tasks – as well as the particular agents – that are causing bottlenecks. In addition to building around these issues, the organization can develop (and even automate) the necessary training.

*“Agent knowledge and the associated coaching, is by far a top priority,”* stresses Correia.

With a clearer sense of its volume needs (across all channels), the organization can also optimize scheduling and task assignment.

A robust approach to workforce optimization is not, however, simply about managing tasks. It is also about gaining a better understanding of agents. By understanding the agents’ unique strengths, weaknesses and personalities, the organization can appropriately tailor coaching and communication.

Eliminating common sources of frustration – such as slow knowledge bases, scattered systems, incomplete screen pops and limited access to call recordings – will also serve to jointly boost agent performance and happiness.

### Recommendations:

- **Adopt a unified approach.** In order to optimize performance, you must be able to view – and manage – all tasks, agents and channels from a single system.
- **Emphasize personalization.** Rather than aiming to optimize the collective workforce in one fell swoop, focus on connecting with – and empowering – each individual agent. This will more meaningfully boost performance, while also creating a better sense of engagement.
- **Focus on the agent experience.** The factors that drive agent frustration also tend to inhibit performance. By eliminating those factors, the business maximizes agent happiness while also boosting productivity.
- **Commit to continuous improvement.** “There needs to be an investment in continuous training and coaching for employees to achieve better performance through targeted insights, personalization, gamification, self-empowerment, and employee focused feedback processes,” says Correia.

### The Automation Opportunity

While automation is positioned as an answer to customer contact channels, implementing and optimizing automation technology can represent an enormous burden.

Organizations must identify which processes to automate – they must also deal with the fallout of using automation in the wrong situations. They must also ensure automation technology is sufficiently connected to other systems. Front-end automation (such as bots) needs to allow for smooth escalation to agent-assisted channels. Back-end automation (such as robotic process automation) needs to fit into the overall workflow dynamic.

Organizations must, additionally, build a “human” operational structure around automation. Specific employees need to constantly monitor and “tune” the automation technology. All employees need to prepare for the fallout of automation and handle the tasks machines cannot complete.

If an organization is thinking about these factors, however, it is on the right path. It is poised to make the most of automation.

Automation, when used correctly, is not simply a “practical substitute” for human work. Bots are not merely a “sufficient” way to reduce call volume; they can actually enhance engagement in certain cases. Internal automation is not merely a way to free agents of monotonous work; it can empower them to become more productive in their “meaningful” tasks.

### Recommendations:

- **Emphasize the why.** Automation may be in fashion, but you should not implement it without a good reason. For which customer interactions do bots make the most sense? Which tasks tend to most notably impact agents’ productivity and ability to meaningfully connect with customers?
- **Consider digital assistants.** “Bots” are not simply for customers; AI-driven assistants can help agents easily get what they need – when they need it.
- **Require integration.** Automation is supposed to empower performance; that endeavor becomes impossible if the technology cannot “play nice” with your other systems.

- **Consider complementary technology.** Automation transforms the customer contact operation, which means it creates new consequences to manage and consider. Technology can help mitigate this issue.
- **Address the human fallout.** With automation handling rote tasks, employees must be trained to properly handle the more meaningful ones.

## Leading Organizations are Leveraging the 4 Contact Center Weapons

By viewing omnichannel, analytics, workforce optimization and automation as weapons rather than burdens, leading organizations have begun to achieve unparalleled success.

These organizations are not, however, relying exclusively on transformative mindsets and strategies. They are also making use of cutting-edge contact center technology, such as that offered by NICE, that amplifies their ability to leverage key contact center weapons.

### The Challenge

EE had no way to predict or prevent complaints before they became serious. It also had no ability to flag or prioritize high-risk interactions.

Leadership also had to devote a significant portion of effort to workforce management issues (such as scheduling).

Individual agents did not have consistent access to information about their own performance, and team leaders did not have enough time for personalized engagement and coaching.

Business needs:

- Improve customer satisfaction
- Reduce repeat calls
- Consolidate workforce management systems

### Solution

The organization leveraged several NICE offerings:

- Recording and Quality Management
- Interaction Analytics
- Workforce Management
- Performance Management
- Real-Time Solutions

### Results

*“NICE solutions deliver changes that benefit our frontline teams day-to-day, making them accountable and self-managing.”* – Simon Moran, Intelligence Manager for EE

Key achievements:

- 88% drop in repeat call rate
- 23% increase in first call resolution
- 230% increase in NPS
- 15% reduction in headcount
- 46% increase in employee satisfaction

### The Challenge

In accordance with a 12-year contract, PSEG Long Island took over management of the Long Island Power Authority electric grid and related customer support in January 2014. The agreement includes a commitment to improve customer satisfaction and provide safe, reliable service.

Business needs: In-depth analytics, Improved CSAT scores, Accurate reporting

### Solution

The organization leveraged several NICE offerings: Recording, Voice of the Customer, Interaction Analytics, Quality Management, Workforce Management

### Results

*“NICE gave us the capability to design and implement a call quality plan that directly and positively impacted customer service.”* – Frederick G. Daum, Director of Customer Contact and Billing for PSEG Long Island

Key achievements:

- 93% customer satisfaction
- Fine-grain performance reporting
- Robust agent evaluations

### The Challenge

Capella University's operations employees relied on their own resources for time off planning and approval.

With neither a formal process for planning vacation time nor any applications designed for it, individuals were not motivated to proactively manage their PTO balances.

When employees became aware of the prospect of losing PTO to carryover limits, a flurry of time off requests were filed and approved without sufficient analysis. This hurt service levels. It also hurt the morale of employees who had to cover for those on last-minute PTO.

Business needs: Cost-effective scheduling, Operational efficiency, Employee engagement, Service and capacity continuity

### Solution

The organization leveraged NICE's workforce management solution.

### Results

*“Personal time off planning is now consistently equitable and satisfying for employees, while protecting the business from capacity and service lapses.”* – Brian Schaeppi, Planning & Reporting Analyst, Capella University

Key achievements:

- Increased employee satisfaction
- Streamlined scheduling
- 400 administrative hours saved
- Sufficient staff coverage
- Consistent service levels



## BUILDING RELATIONSHIPS IN A PERFORMANCE-CENTRIC CONTACT CENTER

Numerous facets of the customer experience landscape have changed in recent years.

Conversations are now spanning devices and channels. Businesses are increasingly empowering customers to solve problems on their own. Automation technology is radically impacting frontend engagement and backend processes. “Effort level” is becoming the definitive barometer of great engagement.

While these changes are radically impacting all facets of the customer contact operation, they are not eradicating an important reality: the customer experience is predicated on connections.

The adage about treating customers as “people” rather than “numbers” remains as true as ever for organizations.

It, in fact, carries even more meaning in the contemporary marketplace. Today’s environment asks businesses to “compete on the customer experience.” Fostering substantive, lasting relationships with customers is one of the greatest ways to excel in that competition.

This imperative to build relationships does not, however, free organizations of the burden to perform efficiently. It does not absolve them of the need to deliver tangible results. It does not excuse them from embracing the latest marketplace trends.

This guide helps organizations navigate that balance. It reveals how to *leverage* key trends, strategies and realities to build relationships that simultaneously increase customer satisfaction and improve business results.

### Communicating the Connection

There was a time in which customer contact professionals presumed a correlation between call length and connections. Chastising organizations and agents that move briskly through interactions, leaders cautioned contact centers that lengthy, detailed “strategic calls” were the only way to build meaningful relationships with customers.

That attitude does not jibe with today’s landscape.

In today’s landscape, businesses and customers agree that fast, frictionless interactions represent the gold standard. Customers are not looking to engage in lengthy conversations with agents. They may not be looking for conversations at all.

Whether through self-service or concise interactions with agents, customers are hoping to attain resolutions as quickly and conveniently as possible.

This thirst for speed does not, however, correlate with a disinterest in relationships with brands. Customers still value – if not require – connections.

It does, however, require organizations to adapt their relationship-oriented mindset to an efficiency-minded world. Organizations must figure out how to cultivate relationships while wholeheartedly embracing the self-service and digital trends.

There are several ways for businesses to simultaneously signal their commitment to connections *and* respect for customer demands.

### **Honoring Channel Preference:**

“Providers” impose communication restrictions on customers. Relationship-minded organizations build an experience for their customers.

That customer-centric experience includes accommodation of channel preference.

Honoring channel preference, it should be noted, is a very specific demand. It involves delivering a complete, resolute, efficient experience in the customer’s preferred channels.

It also involves ensuring channels are seamlessly connected. Customer channel preferences change based on context, and they should never feel as if they – or information about their cases – are locked into a certain channel.

### **Empower Self-service:**

It may not involve a conversation, but self-service is not the enemy of customer relationships.

Comfortable in digital channels and averse to waiting on hold, customers prefer self-service for many issues. Honoring that preference demonstrates a cognizance of customer needs. It, more importantly, demonstrates a commitment to creating the most valuable possible experience for customers.

Not all self-service is created equal, however. Whereas some organizations use “one size fits all” platforms for the sake of stalling customers, relationship-minded ones aim to build legitimate value – and actual personalization – into their self-service experiences. They view self-service as an opportunity to simultaneously empower customers and showcase their commitment to creating valuable experiences.

### **Recognize Customers – Immediately:**

One would not ask a close friend to repeat their name at the start of every conversation.

A relationship-minded organization applies the same logic to customer interactions.

When an organization fails to recognize a customer – particularly a loyal one – it sends the message that it does not truly value the relationship. That customer is a number rather than a person.

To mitigate this concern, the organization must ensure its agents and systems have the tools and data to identify customers at the onset of every interaction. Customers should never feel inclined to question whether the organization truly knows them as individuals – with unique demands, preferences and interaction histories.

### **Leverage Personal Data:**

Recognition is important, but it is only one small part of building connections.

Today’s customers are not impressed by the old-world contact center tactic of frequently repeating their name. They expect the organization to use its familiarity with the customer to enhance the experience.

From using product history to guide the conversation, to allowing familiar customers to skip certain authentication steps, to predicting likely reasons for calling, to delivering proactive messaging in customers' preferred channels, to routing customers to the most suitable agents, to delivering "off-script" resolutions of high contextual value, organizations should use data to make experiences better.

These examples, it should be noted, all serve to *reduce* customer effort and frustration. They underscore the reality that an emphasis on relationships is not a mandate for slow, lengthy, deep calls. It is a mandate to deliver the experience customers really want.

### Sentiment and Intent:

While lengthy calls are out of fashion in today's era of frictionless experiences, the heart of the "strategic call" approach is still relevant.

Specifically, organizations must account for sentiment and intent – not merely customer action – when analyzing and designing their experiences.

Instead of simply tracking behaviors like abandonment and retention rate, organizations should leverage analytics and feedback surveys to assess desires and triggers. Why did customers choose to engage in a certain way? How did they feel about that engagement process?

By answering those questions, an organization can truly tailor its experiences to customers. In doing so, it will implicitly confirm that it sees them as individuals with feelings.

## Achieving the Connection

Not merely a way to express appreciation for customers, each of the aforementioned signals drives operational efficiency while reducing customer effort.

Indeed, a relationship-minded approach is not simply compatible with a performance-conscious business. It can actually help improve performance.

Unlocking that potential, however, hinges on an optimal use of strategy and technology. It requires the application of several best practices.

### Connecting the Customer Experience:

In order to accommodate omnichannel engagement, it goes without saying that an organization must integrate its contact channels.

The goal of *connecting with customers* across all channels, however, requires a far deeper form of integration.

*"Digital engagement isn't only about engaging across all of the channels that consumers use,"* explains Sarah Patterson of Salesforce. *"It's about using all of the digital tools to provide a seamless experience for customers."*

Along with connecting all frontend touchpoints, the organization must develop a unified contact center environment. The CRM system must span all channels. The case management solution should incorporate data from all interactions, regardless of issue type and media. Leadership, meanwhile, should be able to view volume and performance gaps across the entirety of the customer journey.

### Creating Self-service Portals:

Tantamount to “self CRM,” self-service portals provide customers with a more intelligent, more customized gateway to solving problems on their own. Instead of restricting the self-service experience to a static FAQ page or one-off bot, self-service portals grant customers access to a complete record of their past interactions.

Self-service portals spur two major benefits:

- They empower the self-service experience, which increases customer satisfaction and loyalty. The relationship grows as a consequence of the increased value.
- By storing and presenting past self-service data, the organization sends the message that it views each customer as an individual.

### Leveraging Process Automation:

Process automation may seem like an efficiency-minded endeavor, but it is actually a key asset in the mission to build customer relationships.

By automating menial operational tasks, the technology frees agents to focus more intently on customer engagement. They, as a result, are in position to build stronger connections with customers.

Automation technology, moreover, is specifically adept when it comes to processing data. By identifying and interpreting particularly useful customer insights, automation can provide agents with the intelligence they need to quickly – and effectively – tailor experiences to customers.

*“Chatbots do more than just answer FAQs,” says Patterson. “They can also gather information to help an agent work smarter, and if they’re built using natural language processing, chatbots can actually interpret what customers mean when they respond to questions.*

*“AI also empowers agents with an amazing wealth of information, while classifying and prioritizing cases. So agents can see more than just what a case is about, they also know which cases or questions they should focus on first. AI can even alert an agent when a customer experience is at risk of ‘going downhill,’ so they can quickly take a different strategy.”*

### Train the Smile:

Contrary to contact center cliché, an organization absolutely can – and must – train agents on “soft skills.”

Not every agent is equipped to establish personal connections with customers, let alone in a quick, non-intrusive manner. Developing that competency is absolutely essential for building relationships.

The rise of automation technology further underscores the need to cultivate “engagement” skills. Capable of handling transactional matters on their own, customers will only seek agent assistance for complex, challenging matters. To rise to that occasion, many agents will require new training.

*“Customers may be even more agitated and impatient when they go to speak to agents since they will have already tried to solve the problem on their own or failed to reach resolution when confronted by the ‘Service bot,’” says Patterson. “That’s why they need to know how to better handle these harder cases, and how to empathize with customers.*

*“The EQ, or emotional intelligence piece, becomes even more important. Agents need to know when to spend time listening to customers, how to interact with them to show their empathy, and how to do this while trying to solve the problem as quickly as possible.”*

Patterson also stresses the importance of cultivating digital fluency. Agents must be able to meaningfully connect with customers in low-touch, text-oriented channels.

### **Elevating CRM & Case Management:**

Well-trained agents are only as good as their systems.

To meet the demand for relationship-oriented engagement in an efficiency-driven world, agents are going to need to be very good.

Their systems, therefore, must be incredibly robust.

Contact center technology, for starters, cannot be counterproductive. It cannot subject agents to inefficiencies like multiple screens, convoluted knowledge bases, limited (or overly complex) case management solutions or static CRM.

The systems must make use of automation and logic. When the system identifies a caller, it should immediately provide the agent with the caller’s personal details, case history and recorded feedback. It should ensure the agent *knows* the customer to which he or she is speaking.

It must also be predicated on workforce optimization. The systems should help supervisors easily spot performance gaps, training needs and scheduling challenges. To help with self-diagnosis and motivation, agents should have their own access to this information.

# CALABRIO

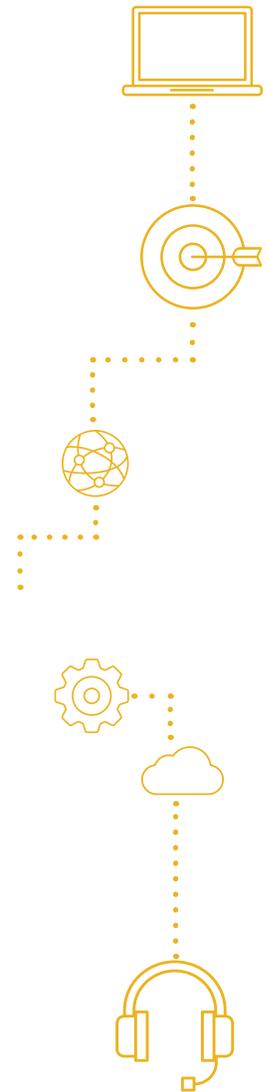
## HOW TO SUCCEED WITH CONTACT CENTER ANALYTICS

You and your executive team likely recognize the potential value of contact center analytics. Timely insights into customer behavior and experiences give your company an opportunity to outpace the competition, nimbly pivot to meet new customer needs and quickly respond to issues. The result? Longer-term, more loyal customers, and happier, more engaged contact center staff.

So why do so many call center analytics deployments fail to meet their full potential—or even simply meet basic executive expectations? We at Calabrio commonly see three main reasons for this frequent disappointment:

- Confusion on what “analytics” really is, or can be
- Inadequate pre- and post-deployment planning
- Lack of ongoing focus, resources and funding

But it doesn't have to be this way. With the right approach and continued consistency, you can realize powerful business benefits from call center analytics. Here's how.



### 1 Get Savvy About Analytics

#### It's All About the Data-Or is it?

Today's “big data” world is data-heavy and data-rich, as a result, for many people “analytics” is synonymous with “hard numbers.” They find comfort in easily digestible salesforce.com reports and executive dashboards showcasing charts with lines that aggressively move up and to the right.

That's why it's so critical contact center leaders help executives in their organization understand and interpret the numbers. Here's how you can make your data more meaningful:

- **Consistently Communicate How Analytics-Based Findings Drive Positive Progress Against Company Goals.** Agree upon a defined set of metrics against which to measure improvement. These metrics should line up to key corporate objectives, such as growing revenue, increasing customer satisfaction or decreasing customer turnover. Compile these metrics into an easy-to-read report that succinctly explains what the data tells you; this could be a combination of data, observations, inferences and hypotheses.
- **Tell Insight-Based Stories, Succinctly Articulating How Analytics Delivered the Findings.** People remember stories, not stats. So, tell the story of each analytics-based project. Explain what your hypothesis was and why; how you gathered and analyzed various data to prove or disprove that hypothesis; what the most important (sometimes unexpected) findings were; actions taken because of the data; and the results to-date from those actions.

- **Ground Your Subjective Findings in Numbers Whenever Possible.** Stakeholder evolution takes time. Whenever you can, weave relevant hard numbers into your stories, so stakeholders have something tangible to anchor to while they digest the other, more subjective findings you present.
- **Avoid “Assumption”—use “Hypothesis” instead.** While common in data analysis, the word “assumption” can be a dirty word in business. Leaders may associate it with error-based decisions, wrong paths taken or just plain laziness. Better to reassure them by aligning with the trusted scientific method and use “hypothesis” when communicating what exactly it is you’re trying to prove/disprove.
- **Tune Your Message for Your Audience.** Few stakeholders can keep up to the subject matter expertise possessed by your data scientists and business analysts. If you want stakeholders to get comfortable with and value analytics-based efforts, you need to communicate with them in a way that makes sense. Skip the jargon and in-depth details—stick to an “executive summary” approach that features succinct, tangible findings and examples. If they want more detail, they’ll ask for it, and you can provide it at that time.
- **Make Frequent, Actionable Improvements.** Don’t wait for a big project or big finding to make analytics-based improvements in the business. Smaller, more frequent successes keep your projects top-of-mind and remind stakeholders of the ongoing value analytics delivers.
- **Show Them the Success in Failure.** Not every hypothesis is proven true. But rewards come from disproving hypotheses, too. The business can move on to other challenges, rather than wasting time rehashing items irrelevant to the company’s long-term success.



### Think Multichannel

Contact center analytics now covers more than speech. And today’s customer satisfaction is about more than net promoter score (NPS).

Today’s tools can analyze what is said—not just during phone calls, but what’s communicated via emails, chats, social media and more. Sentiment, not merely words, can be analyzed. How your agents utilize the tools available to them during customer interactions can be revealed.

This holistic approach helps your business gain more accurate, data-driven insights to improve the customer experience and drive revenue with every customer interaction.

## 2 Plan and Prepare Properly

### Prepare for Change

Companies implement contact center analytics to drive improvement by analyzing the cornucopia of data available within customer interactions. Improvement requires change. But it’s human nature to resist change. And there’s a widespread misunderstanding about what analytics means. So, what do you do?

Any kind of change management is a company-wide endeavor. And it has to start from the very top. If executives aren’t comfortable with the change, you won’t have their support when attempting to implement it with their frontline workers. Therefore, it’s critical you ready internal stakeholders who will provide key input and buy-in to your analytics initiative.

## Gather Your Team

Like any project, who's on the contact center analytics team largely influences whether it succeeds or fails. You need to have the right people, with right skill sets working on it. Here's who to include:



- **A mix of both formal and informal leadership** needs to be on the analytics team in order to drive improvements. A good way to start building this mix is to zero in on the squeaky wheel—find the outspoken leader who's been vocal about an issue contact center analytics can help resolve, and get them involved.
- **Those who work on the contact center analytics project day-to-day** need to be your customer subject matter experts and advocates. They've demonstrated proclivity toward viewing things from the customer perspective and can share their viewpoints with the team.
- **Analysts, coaches and cheerleaders.** Frontline contact center agents and business analysts typically assume these roles. Their purpose is to understand the insights, drive relevant information to the people who need it, communicate that information well and build ongoing enthusiasm for the project.
- **Cross-functional employees.** Finally, contact center analytics is not just a contact center tool—it can drive systematic improvement across the entire enterprise. The analytics team should be cross-functional, featuring members who possess a strong understanding of every aspect of the business.

## Get Input

Just as the team needs to be cross-functional, so do the projects on which the team works. Since analytics can impact every corner of the organization, it's important to encourage everyone in the company to have a voice in the ongoing process and to suggest possible analytics projects. In return, your analytics team needs to promote and maintain a true open door policy.

Frontline agents often surface great suggestions; they do, after all, speak to your customers every day. In fact, it's safe to say nothing is more valuable than your frontline when it comes to contact center analytics initiatives. You need to give them a safe haven in which they can share ideas, insights and observations.

But open door policies and safe havens aren't enough. Your analytics team needs to be receptive to the observations and suggestions they're given. They need to put their own beliefs and egos aside and listen objectively to the information they receive. A culture of continual learning and ongoing improvement will only occur if this type of neutral environment is fostered.

## Set Up the Analytics Team for Success



A common assumption with analytics is that, once you set it up, it just operates by itself. Not true. Analytics needs to be nurtured and fostered. It's a continuous cycle of issues and projects.

As a result, those working on it day-to-day risk burnout or demoralization. They need continual encouragement and support. They need ongoing training and immersion in best practices. They also need empowerment.

How do you do this? Give your team the autonomy and safety to find their voice, to say, “this is what I’m seeing”—let them base insights off of observations, not ego or emotion. Let them apply their intuition, their gut instinct.

### 3 Focus Ruthlessly

#### Institute a Formalized Process

Analytics projects are often waylaid by too many requests or too many distractions. To maintain focus, create a formalized, closed-loop process:

- **Identify Potential Issues to Investigate.** For the most impact, understand the issues from the customer perspective—not from the company perspective. A customer’s perception is their reality. Ask questions like, “What is a customer’s experience with us like? How easy is it for them to do business with us? What are their biggest frustrations with us? How can we improve the customer experience and reduce their effort?” And think like a kid—use “imagine if” scenarios; imagine if you could do this, imagine if you had this information. It’s about possibilities.
- **Prioritize 2-3 Issues.** In the near-term, go for low-hanging fruit so you can demonstrate immediate value and show fast success. These are usually fairly easy, low-cost fixes such as moving a website link, removing outdated information from the website, and removing or enhancing a simple, existing process. Once you have a few of these smaller wins under your belt, start tackling the larger issues.
- **Dig in, Analyze Data and Create Your Hypothesis.** Now it’s time to analyze the data. You’ll need to listen to a lot of calls and review many customer interactions. You might also want to expand your definition of “stakeholder”—consider including user groups, customer advisory councils, or even partners and vendors in your data substantiation process. Then create your hypothesis.
- **Propose and Implement a Project Plan.** The most successful project plans are structured yet flexible and managed from implementation through governance by a single person. A project plan needs to allow the analytics process to grow with customer demand and accurately estimate required future resources. It also needs to outline how analytics-driven insights—backed by actual call recordings or customer emails, chats, etc.—will be disseminated back to stakeholders across various departments and how those stakeholders will be educated on what to do with those insights.

- **Continuously Measure Results.** Throughout the project, measure and record results on an ongoing basis. Establish baselines—the state of the data prior to your analytics project— and measure your progress against them. As mentioned above, synthesize this information into a concise format and distribute it weekly to your stakeholders. In addition, consider how your analytics project can inform your existing metrics and KPIs and adjust accordingly.

Remember, start slow. Stay focused on the most important and/or most immediately impactful projects and close them out before moving on to something else.

### Align With Company Goals

The ultimate goal of any contact center analytics project is to improve—directly or indirectly—customer satisfaction and customer retention. At the same time, executives are likely focused on growing revenues, increasing customer loyalty and decreasing customer churn. These goals are not mutually exclusive. Work with your executives to figure out the information they need from customers to meet their corporate objectives, then use analytics to deliver it. When choosing which projects to tackle, pick the ones that most strongly tie back to company goals.

Then, stay aligned with shifting corporate goals and strategies. They evolve based on market changes, so stay attuned to them. You want to seamlessly shift your contact center analytics as needed to continually support company growth.

Your customers are the heart of your business. And your executive team makes or breaks any project you undertake. Contact center analytics give you a unique opportunity to bridge these two constituencies while meeting both their needs. A successful analytics initiative takes hard work, commitment and dedication, but the resulting business benefits are well worth it.



## CASE STUDY HIGHLIGHT: HOW BETTER TRAINING HELPS CONTACT CENTER EFFICIENCY METRICS SKYROCKET

**Smart Rhino, Ibotta, Trunk Club, and U.S. Cellular leverage three agent-centric best practices—and one powerful training solution—to significantly improve contact center performance.**

A 2015 study by the Electronic Journal of Business Ethics and Organization Studies revealed that the average turnover at contact centers globally is 35-50%. For customer support leaders, an effective training program is an invaluable piece of contact center agent engagement, retention, and productivity. The same EJBO study found that contact center trainees gave their training programs an average effectiveness score of 96%. However, when reviewed by their managers after a month on the job—trainees received scores of only 77%.

So how does a contact center leader begin to address the gap between training and performance? Start by focusing on productivity, just-in-time learning, and practice.

### Productivity

Productivity metrics evaluate reps' efficiency through data points like mean time to resolution, time management, and calls per shift—all captured automatically online. High productivity in these areas is essential for contact center agent success.

According to research by [Temkin Group](#), more engaged employees perform better than their less-engaged peers. In companies with significantly better financial performance than their peers, 77% of employees are highly or moderately engaged, compared with only 49% of employees in companies with lagging financial performance. But an always engaged, productive contact center is elusive, even for the most experienced manager.

Downtime is a common issue with reps, particularly during non-peak seasons. Our friends at [Smart Rhino](#) installed an extra monitor at the station of every contact center rep to ensure their employees had constant access to essential product information and training materials. Now, when they aren't on the phone, those reps are continuously learning and brushing up their skills and knowledge. This means that every minute of the team's time pays dividends toward higher customer satisfaction and better productivity.

#### Productivity In the Real World:

#### **Smart Rhino Powers a Distributed Team With 100+ Rapidly Changing Campaigns**

*"Lessonly allows us to disperse new content out to recruiters and agents within a matter of minutes. And we love how consistent the information is because of Lessonly...We plan on using Lessonly for a really long time." Ben Paynter, Chief Operating Officer, [Smart Rhino Labs](#)*

### The Challenge

Smart Rhino Labs needed an easy way to keep their fleet of agents and recruiters—both onsite and remote—enabled and updated. Their rapidly growing team had to move fast and maintain consistency across lots of moving parts: more than 30 web properties, hundreds of rapidly changing campaigns, and multiple verticals—including ride-sharing, trucking, medical, and sales.

They knew this level of communication wasn't going to come from an email or chat service. That's when they found Lessonly.

### The Process

The Smart Rhino team uses Lessonly for both new-hire onboarding and continuous training—everything from company policies to product information is centralized in one location. Smart Rhino's campaign manager Emily Nielsen notes that “things in the company are always changing, and we need new lessons and new information rolled out. Lessonly has been great for updates, changes, and policies.”

As trainers work with new employees and encounter new questions, they turn around and work those questions into lessons to help bring future team members up-to-speed more quickly—maximizing long-run productivity. Ava Lieb, a team lead, notes: “If I find that a lot of my agents are coming to me for something, I can reach out and say ‘Hey, this is something that we should probably create a lesson on.’ I cannot stress how much that has helped.”

### The Results

The end result? Consistency. “I hear that word 50 times a day when talking about Lessonly,” Ben says. “It's very clear who's gotten what information, who's read through it, who understands it, and what information we've pushed out.” This consistent information across the company—from the very highest campaign manager down to the newest entry agent—has significantly improved Smart Rhino's productivity and quality of service.

Smart Rhino Labs plans to keep expanding its use of Lessonly. [Read more and watch the video here.](#)

## Just-in-time Training

Requiring contact center agents to know everything about everything is a recipe for burnout, dissatisfaction, and employee churn. We believe that giving modern workers easy access to critical information is infinitely more powerful than expecting them to master it. Provide a searchable, central hub of truth—or use the power of software to automatically recommend information that helps an agent address a customer issue.

Numerous contact centers use Lessonly for Chrome, Lessonly for Zendesk, or other integrations to suggest lessons and knowledge in real-time to help agents address customer concerns. The result? Faster response times, greater confidence, and higher customer satisfaction.

**Just-in-time Training In the Real World:****Ibotta Pairs Lessonly and Zendesk to Deliver Superior Customer Support**

*“We encourage our agents: If you don’t know it, check Lessonly. If Lessonly doesn’t have what you’re looking for, check Zendesk! If we find there was no answer for this question, we fix it, so the next person doesn’t have to go through the same process again.” Chelsey Michniewicz, Care Training Supervisor*

** The Challenge**

As the #16 most-used mobile app in the U.S. (according to Consumer Research Partners), Ibotta’s Care Team supports questions from thousands of users. Chelsey Michniewicz, the Ibotta Care Team Training Supervisor, has watched the Care Team grow from a few agents crammed in one office to a large remote team.

** The Process**

How did technology make this growth possible? The perfect pairing of Lessonly and Zendesk provides a powerful one-two-punch for customer service and care agent training and knowledge management—resulting in world-class customer care.

Ibotta Care agents spend about 20% of their time in Lessonly. Chelsey and her team link lessons to specific pages in Zendesk, so Lessonly automatically prompts the agents with helpful content related to the tasks at hand. Lessonly and Zendesk’s internal knowledge base work in tandem to continuously provide Ibotta reps with the best possible training and enablement content—all of which helps the team deliver amazing care.

** The Results**

You might think an ever-increasing user base and remote team would lead to a decrease in customer care quality for Ibotta. On the contrary, even with increasing traffic and busy seasons, customer satisfaction scores continue to rise. Chelsey’s team is more effective thanks to Lessonly and Zendesk—and her reps agree:

*“Zendesk and Lessonly have helped a lot with user tickets. I enjoy that I can get help on demand right when I need it! I try and do as many Lessons as possible, as I find them extremely helpful.” Jessica Wayda, Care Agent*

In the end, Lessonly and Zendesk pair together to help Ibotta agents do better work and help Ibotta customers live more rewarding lives. [Click here to read more.](#)

**Practice**

With numerous product SKUs or support solutions to remember, high knowledge retention is an expectation for the modern contact center rep. The best way to solidify ideas and skills is realistic practice—just ask any sports team. Contact center teams that want to rapidly improve performance at scale should adopt the same strategy.

When designing a contact center training plan, ensure that ongoing practice is part of the cadence. Lessonly’s Video Response feature empowers reps to practice their skills on a regular basis and gives managers an easy way to offer feedback. This approach helps the team hone their skills and rapidly improve—before real customers are on the line.

**Practice In the Real World:****Trunk Club Uses Lessonly to Train 750+ Reps Monthly**

*“Trunk Club changes every day, by the minute. I love that with Lessonly, we’re able to update content as quickly as our business changes.” Kathryn Pelino, Sales Training Program Manager, **Trunk Club***

 **The Challenge**

Trunk Club, a Nordstrom Company, has been disrupting the clothing industry since 2009 by bringing the world’s greatest clothes straight to doorsteps. To keep pace with the speed of fashion—and evolving customer expectations—Trunk Club is constantly changing. Lessonly was the answer to deliver consistent change at both speed and scale.

*“Having a tool that communicates for us and helps us give hundreds of people the same message is fantastic...And when our employees are empowered with knowledge, they feel more empowered in their jobs.” Katie Bithos, **Service Lead***

 **The Process**

Before Lessonly, Trunk Club ran training through a blend of in-person training, binders, and Google docs. Kathryn remembers, “We had binders and a lot of in-classroom training. With Lessonly, we can be more strategic about our time spent in the classroom.” That means more time spent practicing skills rather than reading documents or listening to lectures. As new products or changes come out, the Trunk Club team uses quizzes in Lessonly to ensure that reps understand the material, internalize the information, and put their knowledge into practice.

In addition to powering training with Lessonly, Trunk Club regularly updates their lessons with product information—creating a living resource for their service reps and stylists. Brittany Jansen, a Training & Development Specialist at Trunk Club, believes that Lessonly’s impact is just beginning. “Lessonly is going to be our single source of truth at Trunk Club.”

 **The Results**

The Trunk Club team most appreciates Lessonly’s powerful simplicity. Kathryn adds that this simplicity leads to speed. “The biggest benefit of using Lessonly for our team is how quickly we’re able to edit and change it. We have new features launching every single week, and if it took us a while to upload, build, and change content, we would be years behind.”

Trunk Club is revolutionizing how consumers buy their clothes—and Lessonly helps them accomplish that mission by enabling practice, change at scale, and superior training. [Click here to see the full story and videos.](#)

**Want to Revolutionize Your Contact Center Training?**

Lessonly is designed to help contact center agents learn, practice, and perform at the highest levels. Our online training software is used by hundreds of support teams, from small contact centers to Fortune 10 companies, and over 1.3 million learners. Lessonly powers training that results in 40% higher productivity, 67% faster onboarding, 200% improved NPS, and most of all—happier customers. Learn more at [Lessonly.com](https://www.lessonly.com).

## U.S. Cellular Powers Training at Scale With Lessonly

*“What’s great is that we finally now have our entire sales force and customer service organization marching to the beat of the same drum.” Lindsay Young, Intranet Manager, U.S. Cellular*

### The Challenge

With over 6,000 sales associates and customer service reps, U.S. Cellular, the nation’s fifth-largest full-service wireless carrier, needed an efficient way to drive consistency and manage rapid change at scale.

For years, store and contact center leaders used 10 to 15-page, text-filled documents to conduct training. Reading or presenting these documents in team meetings wasn’t working; it was inefficient and inconsistent. That’s when U.S. Cellular turned to Lessonly.

### The Process

U.S. Cellular wanted to bring a total paradigm shift to driving training at scale. Lessonly’s online training software—focused on simple, powerful, bite-sized learning—was the perfect fit.

With these tools, the U.S. Cellular team began transforming 10-15 page training documents into modern, bite-sized, 15-minute lessons. The impact on their global team was almost instantaneous—they began to save thousands of man-hours by delivering more effective training and holding more efficient meetings.

### The Results

In addition to better clarity in communication, greater feedback loops in training, and tens of thousands of hours saved in meetings, Lessonly exceeded U.S. Cellular’s goals and helped them build an effective, bite-sized training program. This strategy, paired with Lessonly’s focus on speed, access to information, and detailed analytics is keeping U.S. Cellular nimble with whatever changes come their way.

Jason concluded, “That way of thinking is not just important in the wireless industry, which is dynamic and changing all the time—it’s important for all organizations.” [Click here to see the full story and videos.](#)



## WHICH METRICS ARE IMPORTANT IN OPTIMIZING CX?

Customer experience is difficult to break down into measurable elements. Not only that, but providing the optimal customer experience is key to the success of your business. We're often faced with the question: "what do we need to measure," as metrics have become an integral part of optimizing our business framework. So which metrics should you focus on when looking to optimize your customer experience?

### What is the customer experience?



This diagram clearly shows that the customer experience is a multifaceted concept. This also means that there's an opportunity to impact the whole experience in many ways. But it can be difficult to figure out how to calculate or determine which data is important when optimizing your customer experience.

### So which metrics should you be looking at?

#### 1 Conversion Rate

This is the percentage of interactions made by customers that result in completed sales or transactions. Basically a conversion is when your customer or user takes an action you want them to take.

#### Why should you measure this?

Conversions go a step further than simply being an indication that your users or customers like your product or service. It's arguably one of the most important metrics in business to determine the effectiveness of your customer experience. The higher your conversion rate, the more likely it is that your customers find your offer appealing.

### How can you measure this?

Depending on your business you should first define goals that you'd consider conversions. Conversion rate is the total number of completed transactions/sales divided by the total number of transactions (total completed transactions / total number of interactions). You can do this by using a third party tool such as Google Analytics, Piwik, Clicky, or other [web analytics tools](#).

## 2 Customer Churn Rate

Though this metric is more relevant to SaaS companies, it's still key in analyzing your customer's lifetime value. It's loosely defined as your 'customer turnover' and refers to the percentage of your customers that don't remain loyal to your company.

### Why is measuring this important?

Your customer churn rate is a good indication of whether your product or service meets customer expectations. It's ideal to have renewed contracts or continuous purchases made by customers as it increases the value of each customer and potentially reduces your acquisition costs.

### How can you measure this?

Presumably you've got a CRM system that collects and stores all your customer data. You can calculate your customer churn rate by dividing the number of lost customers by the total number of active customers over a certain period of time ((Lost customers/total active customers] / time).

## 3 Net Promoter Score

Customers Respond on a 0-to-10 Point Rating Scale and Are Categorized as Follows:



### Detractors (Score 0-6)

Unhappy customers who can damage your brand, impeding growth through negative word-of-mouth.



### Passives (Score 7-8)

Satisfied but unenthusiastic customers who are vulnerable to your competitor's offerings.



### Promoters (Score 9-10)

Loyal enthusiasts who will keep buying, refer others, and fuel growth.

This is the score that indicates your customers' willingness to share your product/brand with others.

### Why is measuring this important?

Though it's only a single question it's a simple and effective way to gain insight into your customer's opinion of your product or service - and your potential brand advocates. NPS helps you gain insight into customer loyalty and whether or not they'd want to be associated with your brand.

### How can you measure this?

The best way to measure NPS is using customer surveys. The survey typically includes only one question: "how likely are you to recommend (your product name) to a friend or colleague?" This question is then answered using a scale from 0-10. Your NPS score will be the result of the number of promoters divided by the number of detractors.

#### 4 Customer Effort Score (CES)

This scoring determines the relative effort that it takes for a user or customer to work through a specific interaction.

##### Why is measuring this important?

Generally, your customers want to achieve their goals **without having to work too hard** to do so. So depending on the amount of effort it takes for your customer to complete an interaction, there's always the possibility that they'll drop-off. The less effort required, the more likely the interaction will be completed.

##### How can you measure this?

The most effective way to measure your CES is by using a post-interaction survey. In this survey you would ask your customers how much effort it required for them to complete an action and whether they felt it was worth completing in the end.

#### 5 Customer Satisfaction Score



This is the average satisfaction score given to you by your customers for a particular experience.

##### Why is measuring this important?

By analyzing your customer satisfaction, you'll get the insights needed to optimize and improve your product or service. In doing so, you'll be able to adjust your offer to meet the needs of your customers and, therefore, increase the chances of repeat business.

##### How can you measure this?

The best way to measure this is through a customer satisfaction survey that requires your customers to rate their overall level of satisfaction on an emotional scale. For example, a scale that rates your product or service from 'hate' to 'love' would be an ideal way to do so. Certain companies prefer to make it more personal, and instead opt for smileys to reflect a particular feeling.

#### Conclusion

These are only a few of the metrics available that you could use to optimize your customer experience. But this is a great place to start measuring if you're looking to optimize CX. By creating an experience driven by your customers' feedback and opinions you'll be more able to improve the positioning of your service or product. Above all this customer data will make clear which elements you need to improve on to provide a positive customer experience.

Are there any other metrics you use to optimize your CX? Share them in the comments section below or tweet us [@usabilla](https://twitter.com/usabilla).

## APPENDIX



### **Customer support channels to Master in 2018**

There's a lot of talk about using new and impressive technologies—like artificial intelligence driven chatbots and virtual reality—to improve support and the customer experience. But there are well-established communication channels that brands should (and in many cases need to) focus on mastering first.

### **5 Myths of Outsourcing**

Some of the most successful brands across industries are outsourcing their customer care with great success. The negative image of customer service and support is the result of a variety of myths about outsourcing—read on to see how these myths are dispelled.

CALABRIO

### **How to Make the Case for Advanced Contact Center Reporting**

As contact center agents interact with customers over more communication channels, creating meaningful reports from all these disparate data sources is incredibly challenging. That's why many businesses are making the move to an advanced contact center reporting solution. This whitepaper shares seven tips to create a business case for advanced contact center reporting in your company.

### **Transforming the Contact Center into a Customer Intelligence Hub**

Did you know only 2% of contact center data is analyzed on average? The remaining 98% gets stuck on a server or in the cloud, never scrutinized or touched. In short, there's a tremendous amount of valuable voice-of-the-customer data that is left behind. Download our ebook to learn how you can tap the remaining 98% of your VoC data and transform your contact center into a customer intelligence hub.

TRUSTID<sup>o</sup>

### **The Solution**

TrustID authenticates all callers automatically, instantly and invisibly before their call is answered. These trusted callers get help faster, while suspicious callers get routed to forewarned staff.

By quickly and strongly authenticating callers it's easy to create a Trusted Caller Flow™ solution that minimizes knowledge-based authentication, increases IVR containment, lavishes callers with self-service options and allows agents to move quickly into problem solving mode instead of identity-interrogating callers. And by splitting out trusted callers right away, it's possible just to focus fraud fighting staff and tools on more questionable callers.

### **How IT Works**

TRUSTID provides an ownership-based authentication token that allows call centers to identify trusted callers before answering. This automatic, highly accurate approach lets call centers quickly identify callers that should enter trusted flows for better, faster service. This reduces operating costs and improves customer satisfaction. Identifying trusted callers so quickly also allows fraud-fighting tools to focus on unidentified calls for improved efficiency.

## 2018 EDITORIAL CALENDAR

### MARCH

**Market Study:  
Performance & Metrics**  
March 26, 2018



### MAY

**CCW Online: Performance & Metrics**  
May 22-23, 2018 | 12PM EST  
[Register for FREE ▶](#)

### AUGUST

**Market Study:  
Customer Experience**  
August 27, 2018



### SEPTEMBER

**CCW Online: Customer Experience**  
September 25-26, 2018

### NOVEMBER

**Market Study: Future of the  
Contact Center 2019**  
November 12, 2018



### DECEMBER

**CCW Online: Future of the Contact  
Center 2019**  
December 4-5, 2018

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