



SPECIAL REPORT:

# PRIORITIES FOR THE CHIEF EXPERIENCE OFFICER

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## SPECIAL REPORT CONTRIBUTORS:



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# SPECIAL REPORT FOR CHIEF EXPERIENCE OFFICERS



Ask a mid-level customer experience leader about the top marketplace trends, and you're sure to hear talk about enhancing self-service, creating more personal experiences, reducing customer effort, connecting contact channels and satisfying agents.

Ask senior executives the same question, and you're likely to hear vastly different answers.

Make no mistake, each of the aforementioned examples *is* very important to the customer management landscape.

Executives, however, need to look beyond these specific, microscopic endeavors and initiatives. Whereas contact center leaders are focused on executing a great experience, executives are responsible for building a framework that allows for such execution.

They, as an example, are not necessarily stressing over the specific use of a chatbot solution. Their emphasis is on how to build an organization that can support and amplify the impact of the chatbots, however they are specifically implemented.

Executives touch the contact center for matters of why and how. They set the objectives, and thus provide context and motivation for specific contact center investments. They also establish the operational framework, consequently determining the contact center's ability to perform.

This special report does not ignore the "what." It, in fact, begins by exploring some key operational priorities when it comes to customer engagement strategies and investments.

It does, however, transition into a discussion about the broader lens through which executives must manage customer contact strategy. It, specifically, reveals five strategic concerns they must rigorously address.



## WHAT THE CUSTOMER EXPERIENCE FUNCTION CONSIDERS

Yes, customer contact executives cannot fixate on the day-to-day contact center operation. They must consider the bigger picture. Why are certain customer contact objectives important? What type of framework is required to achieve those objectives? What impact will achieving (or failing to achieve) those objectives have on the health of the overall business?

That does not, however, mean they can afford to *ignore* specific customer management initiatives. The performance of the function – specifically, its ability to deliver the best possible customer experience – absolutely falls under the executive’s jurisdiction.

An investigation into the role of the customer contact executive must, therefore, consider current initiatives and trends within the customer management space. Without knowing what customers want and the practical mechanism through which contact centers can deliver, the executive cannot properly understand, let alone optimize, the center’s role within the overall business.

### FP3 Experience

At its core, the goal of the contact center is to successfully engage with customers.

The ideal interaction experience, in today’s marketplace, involves four key tenets:

1. It is frictionless.
2. It is personalized.
3. It is predictive.
4. It is proactive.

Thought leaders argue that customers, above all, seek a quick and easy solution to their problems. Concurring with that philosophy, businesses identify “reducing effort” as their #1 customer experience priority. Great customer experience journeys, accordingly, are as frictionless as possible.

That does not, however, mean they are impersonal and transactional. Businesses identify “personalization” as the #1 sign of customer centricity; 91%, in fact, say they are committed to incorporating some degree of personalization into their experience journeys.



Ambitions to reduce effort and increase personalization combine to drive emphasis on *predictive* experiences. By using personal insights about each customer, the business can anticipate the intention of the interaction and more quickly (and easily) provide the requisite solution.



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Customers are demanding low effort and a great customer experience, and that’s what predictive analytics provides,” noted David Baker of CenterPoint Energy during a CCW Online Q&A.

“It’s the foundation to allow for a great experience with low-effort.

“It can drive a sense of personalized service, quicker service, and allows us to come across as knowledgeable of their needs.

”

Predictive interactions, of course, hinge on the customer actually making contact. The next evolution involves avoiding that step and *proactively* delivering value. Customers greatly appreciate this concept, identifying proactive outreach as the most effective way to add value and/or regain their trust.

## Key Investments

In pursuit of the FP3 experience (and other customer experience and overall business objectives), organizations are prioritizing investments within the self-service, customer intelligence, omnichannel and workforce management spaces. Some investment areas are particularly urgent.

### Self-Service—Web

While mobile self-service and AI-driven chatbots are definitely on the radar, organizations view web self-service as a particularly urgent priority. Organizations are done reducing websites to “information hubs” where customers can find out how to contact the support team. They want the website to steer customers to a direct solution.

### Omnichannel—Live Agent/Voice Support

Digital engagement is on the rise, but telephony is most certainly not dead. Aware that many customers still prefer (or are at least conditioned to expect) to speak to live agents, organizations remain committed to investing in their “call centers.”

## Customer Intelligence – Satisfaction/Loyalty Measurement

As they represent the most universal customer experience goals, satisfaction and loyalty can no longer be viewed as abstract concepts. Businesses must develop real-time, accurate ways of measuring satisfaction, and they are investing heavily in tools that facilitate that process.

## Workforce Management – Training

You can hire great agents and provide them with great systems, but success hinges on their ability to best leverage their talent and tools. Training helps tap into that potential and is thus a paramount, urgent contact center investment. Inherently valuable, training is currently commanding special attention due to the rise of low-touch and self-service channels. As customers handle transactional matters in those environments, they will only require agent support for unique, complex matters. Agents must be trained to handle these deeper conversations.



## THE EXECUTIVE APPROACH: STORYTELLING

Customer experience executives cannot simply focus on what they are saying. They must focus on how they are saying it. They must master the art of storytelling.

Whether developing communication for customers, agents, functional leaders, other department heads or members of the C-suite, great executives ensure the context, purpose and meaning behind their words are all abundantly clear. They do not give orders; they tell stories.

There are several key mechanisms through which an emphasis on storytelling elevates customer experience performance.

## Makes Data Actionable

“Raw data” has limited impact. Actionable insight, on the other hand, empowers the customer contact team to perform.

A successful executive understands that reality, and acts accordingly. Specifically, the executive ensures that all customer contact center technologies provide agents – and customers – with a “story.”

Great CRM tools, as an example, do not merely keep a record of a customer’s interactions. They integrate with the contact center system to provide agents with the specific context they need to solve a specific customer’s problem, exactly when they need it.

## Forges A Connection With Customers

Customers have a myriad of options when it comes to buying a product. Why should they select your company?

Storytelling helps you answer that question. It communicates your brand’s vision, identity and commitment to satisfying customers.

It turns your brand from a “merchant” into an entity with which customers want to connect.



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If you look at a company like Chick-Fil-A that will close on Sunday, they have [clear] *values*,” explains Shep Hyken with regard to the importance of pairing a great service experience with a good vision.

“Customers will work with [such companies] because they do good work, give a good level of service and stand for something customers stand for.

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## Gives Context To The Contact Center

Do your contact agents know why they are engaging with customers in a certain way? Do your contact center leaders understand which results matter to key business stakeholders?

When you can answer those questions in the affirmative, you can be confident that your contact center is on the road to success. With purpose for their efforts, contact center employees will be able to look beyond the tasks they are explicitly assigned and focus on the results they ultimately need to deliver.

In addition to better motivating them to perform, the context empowers contact center leaders and agents to make the best possible decisions when they have to go “off script.”

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This isn't about throwing process willy-nilly out the window; it's about preparing people and enabling them to make a decision about the situation and what's warranted," explained Jeanne Bliss in a CCW Digital webinar. "What's important about this is as we become increasingly self-sufficient in almost every part of our lives, when people opt out of self-service and really need help, it's really critical that the person reach is empathetic, is knowledgeable, is given the tools to make decisions and then trusted. I call this letting policy and the Golden Rule collide.

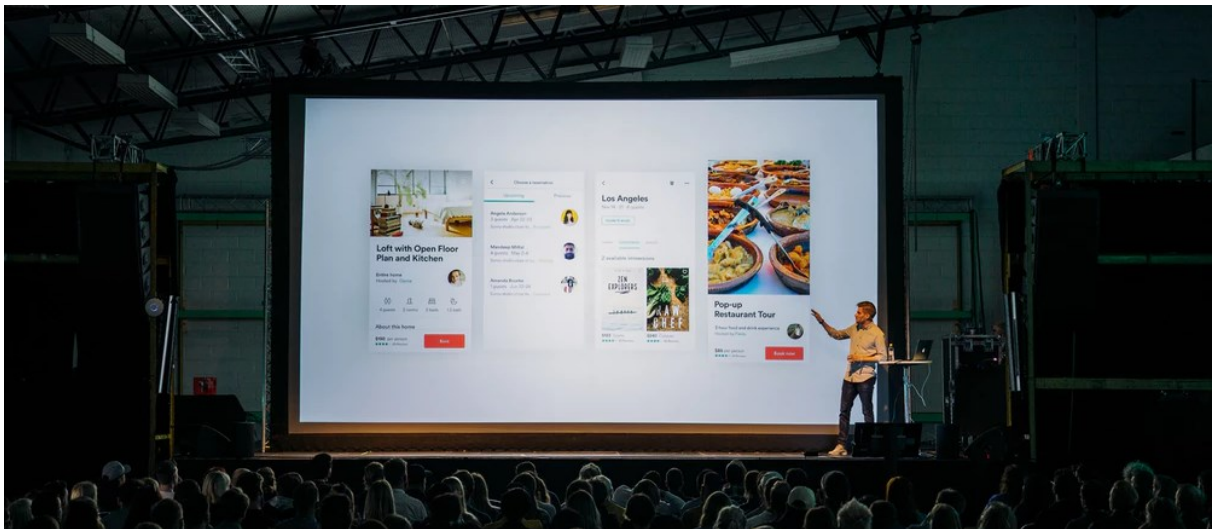
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### Sells The Contact Center To Key Stakeholders

For decades, customer contact leaders have identified a lack of “buy-in” as a major inhibitor to performance. Their organizations do not believe in the importance of the contact center, and accordingly do not provide the function with enough budget, resources or leeway to perform.

Through storytelling, a customer-oriented executive can mitigate this concern. Specifically, the executive can present “contact center objectives” (driving satisfaction, reducing effort, integrating channels) in language that resonates with those solely focused on “business outcomes.”

While a CEO may not understand the necessity of a social customer care team, he or she will understand the cost of losing customers due to poor engagement on social. A storytelling executive successfully makes that case.





## THE EXECUTIVE APPROACH: RISK MANAGEMENT

Leaders within the experience center focus on adopting best practices and optimizing results.

Leaders at the executive level must consider the ramifications of that performance. Specifically, they must consider the overarching “risk” associated with the customer experience function.

The contact center is not Vegas, after all. What happens inside its walls most certainly does not stay there. It meaningfully impacts the overall business, and it is the job of the customer-oriented executive to understand and manage that impact.



**Rethinking Customer Data:** For the past several years, the message for customer-facing professionals has been “data is king.” The more you can collect about your customers, the better you can perform.

With regulations like the GDPR taking effect, that relentless quest for data must be curbed.

Organizations now must think carefully about how they gather and use customer information, and it is up to the executive to steer the company toward perfect compliance.

Keep in mind, however, that customers are not going to suddenly relax their demands for fast, frictionless, personalized experiences simply because of new regulations. That introduces a new game of “doing more with less” and thus exacerbates the challenge for customer-oriented executives.

**Industry Regulations and Compliance:** The contact center engages in open, sometimes public conversations with paying customers. Naturally, regulatory compliance represents a major concern.

While contact center supervisors (and systems) generally monitor quality and compliance on a day-in, day-out basis, the executive is ultimately responsible for building a compliant framework.

Customer-oriented executives must possess an obsession for understanding, communicating and enforcing industry compliance. They must leverage accurate, real-time knowledge of key regulations when selecting technologies, collaborating with product teams, establishing policies and procedures and reviewing contact center performance.

**Adapting to the Digital Age:** The digital revolution is compounding the compliance challenge.

In addition to considering broad industry regulations, executives must consider the specific impact of digital channels. To what extent can a bank engage with customers on a social network? Can a doctor send medical information via text message? Can an insurance company allow a chatbot to process a complex insurance claim?

While it would be easy to just assume “no” and route any sensitive interaction to the traditional call center, such an approach would violate the principle of customer centricity. Many of today’s customers *prefer* simple, straightforward interactions in web, social and mobile channels. Since companies must do everything they can to honor that preference, they must do everything they can to navigate the regulatory water.

Low-touch channels are, moreover, appealing from a business standpoint. Insofar as the executive is looking to generate the highest ROI possible, it would be thoroughly problematic to avoid opportunities to leverage digital media.

It, of course, would be even more problematic to violate regulations when using those digital channels.



**Brand Reputation:** The idea of “competing on the customer experience” is not a motivational façade designed to increase contact center performance. It speaks to an undeniable reality in today’s marketplace: brands (and their advantages over competitors) are absolutely defined by their customer experiences.

Indeed, the customer experience markedly impacts a brand’s reputation, and executives must account for that reality.

The cost of satisfying a particular customer may seem steep in comparison to the value of the particular transaction. But it may seem like pennies on the dollar in comparison to the cost of that customer badmouthing the brand on social networks.

**Partner Relations:** Not every company relies on traditional contact center outsourcing. Virtually every company, however, relies on partners for some aspect of their customer experience delivery. Their ability to successfully connect with customers, therefore, hinges on the performance of third parties.

Leaders within the contact center can help manage day-to-day partner activity, but it is up to the high-level executive to devise high-level partnership strategy. They must identify credible partners, establish objectives and set the tone for long-term relationships.

## THE EXECUTIVE APPROACH: ENTERPRISE MOBILITY

Insofar as executives are responsible for establishing the customer experience framework, few topics are more pressing than “enterprise mobility.”

By empowering employees and key stakeholders to connect from outside the corporate walls, the mobility movement fundamentally transform the notion of an “experience center.”

Executives are responsible for facilitating – and then managing the impact of – that transformation. There are some key points to consider.



### Adapting to the New Workforce

While technology may make the movement possible, “mobility” is ultimately a workforce construct. Increasingly averse to the conventional office environment, today’s employees seek to work remotely (whether on the road or from the comfort of their home).

As the driving forces behind major systemic decisions, executives must determine the extent to which their companies will honor this preference. Will they work to accommodate the mobile workforce? Or will they remain committed to the strict-walled “call center”?

If they choose the former, they must account for all associated challenges. What ramifications do mobile systems have when it comes to data protection and privacy? How can the organization establish performance standards and culture when some employees are not in the physical office?

### Rethinking the Experience Center Aesthetic

The mobile revolution does not simply involve a desire to work remotely. It also involves an aversion to the conventional, cubicle-based contact center environment.

When they do report to the office, many employees do not want to be constrained to a single cubicle. They admire workspaces that allow them to move about the facility, all while staying connected to the core contact center platform.

Executives are also responsible for addressing this demand. To what extent will they transform their “constrained” contact center environment into an open, collaborative one? What systems are required to accommodate that vision?

## THE EXECUTIVE APPROACH: IMPROVING (AND INTEGRATING) TECHNOLOGY

Enterprise mobility is a trendy, urgent iteration of a broader executive focus: technology integration.

CCW Digital research confirms that disintegrated technology is the #1 performance bottleneck, #1 systems challenge, #1 source of agent frustration and #1 reason for customer complaints. It is the single greatest threat to a successful contact center.

Since few operational contact center managers have the capability or authority to connect the full suite of contact center systems, integration lies exclusively with the executive. The executive determines the extent to which the systems are connected and, thus, the extent to which the contact center can perform.



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For over 15 years, I have worked in organizations who have had desires to have a single system with a single view of the customer,” said Jason Bradshaw of Volkswagen Australia ahead of CCW Vegas. “Despite [many companies having this vision] and the advancements of many software platforms, this still remains a goal not a reality for many.”

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Indeed, the problem is certainly not an easy one to solve. There are several factors executives must consider.

### The “Expansion” Threshold

The marketplace is constantly evolving. Customer and agent demands are constantly changing. All contact centers therefore will need to add new technological capabilities.

When making those additions, buyers will always face a fundamental question: do we add to our existing stack or do we replace the core framework?

The executive must establish a rubric for evaluating that choice. How costly would it be to completely overhaul the contact center stack (and how future-proof will that new stack be)? How problematic would it be to add one-off systems to the existing technology environment?

While vendors are working to simplify the situation (“integrators” help connect disparate technology, while enterprise technology providers are encouraging app development on their platforms), there is no escaping the need to upgrade technology – and thus address the potential integration challenges.



## Experiences For Agents and Customers

In theory, integrating technology is a fundamentally pro-customer, pro-agent endeavor.

In practice, efforts to “upgrade” technology can downgrade the experience for both parties.

“Integrated” technology is not necessarily more usable for agents or more valuable for customers, particularly right out of the gate. Executives must take that reality into account when making decisions.

All savvy technology buyers know to focus on functionality rather than flash.

Savvy customer contact center executives must focus on practical usability rather than theoretical simplicity.



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At Volkswagen Australia, we are exploring AI tools to help our Contact Centre and Roadside Assistance Teams be able to respond to customer needs faster,” said Jason Bradshaw in an interview ahead of CCW Vegas. “This isn’t about using ‘bots’ to respond to customers but about helping our Team Members gather information from multiple sources in timely, intelligent way so that they can respond accurately and quickly to our customers needs.

“We aren’t looking at having bots [for customers] because they don’t deliver on what we want to deliver from an experiential point of view.

”

## Organizational Impact

Thought leaders may portray “people, processes and technology” as disparate concepts, but they are actually fundamentally connected.

People and processes determine the extent to which an organization can benefit from new technology.

New technology, meanwhile, carries considerable impact for people and processes. It is up to executives to understand and optimize that impact.

Consider AI engagement tools, as an example. When implementing chatbots, the organization will have to consider where to deploy them, how to pre-populate the tools with industry knowledge, how to “tune” the bots over time, how to glean insights from bot interactions, how to measure the success of the bots and how to prepare for the impact on workflow.

It may take major organizational changes to address these matters. An organization may need to hire AI experts and data scientists (or at least contract supportive vendors) to properly tune its bots. Depending on the scope of the rollout, it may even need to create an “AI department” that handles all tasks related to automated engagement.

With bots handling certain types of issues, contact center leaders will also need to train agents for their “new” responsibilities.

## THE EXECUTIVE APPROACH: CREATING A CUSTOMER-CENTRIC ORGANIZATION

The fact that “customer-oriented executives” even exist already represents a small victory. By giving “chief customer officers” or “chief experience officers” seats at the executive table, organizations are already taking a vital step toward customer centricity.

Truly customer-centric executives do not, however, settle for that quick win. They do not celebrate the fact that they have a voice in the C suite. They use their voice to effect meaningful, customer-oriented change.

They do not simply work to command short-term respect for the customer contact function. They work to ensure the “customer experience” is a pivotal, long-term focus for the entire organization.



“

Some organizations focus on customer experience as a short-term objective and then when things don't change overnight they abandon plans,” cautions Jason Bradshaw of Volkswagen Group Australia.

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### Uniting The Business

On the one hand, it is easy to embrace the rhetoric that the customer experience needs to be a priority for the entire business.

On the other hand, it is important to remember that all executives and departments have their own immediate concerns and objectives. Those focuses may connect to – let alone align with – the vision for the contact center.

The customer-oriented executive must work to forge that alignment.



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When we do customer service transformation, the service leader has to be linking arms with the rest of the organization,” noted Jeanne Bliss during a CCW Digital webinar. “This isn't a culture they can change inside of the call center without the united approach of the leadership team.

”

There are two steps to that endeavor.

**First**, the executive must demonstrate how the customer experience directly impacts other departments. Through a combination of storytelling and clear communication, the executive can articulate the connection – and begin to make the case for alignment.

**To seal the deal**, the executive will want to answer the all-important question: “what’s in it for me”? Instead of merely asking other department leaders to think about the customer experience, astute executives incentivize collaboration.

Contact center data can play an instrumental role in communicating that value. By using customer insights to help the product team address quality issues, the sales team more effectively pursue leads or the marketing team drive higher conversions in social channels, executives will provide other departments with a compelling, self-serving reason to support the contact center.

## “Marketing” the Customer Experience

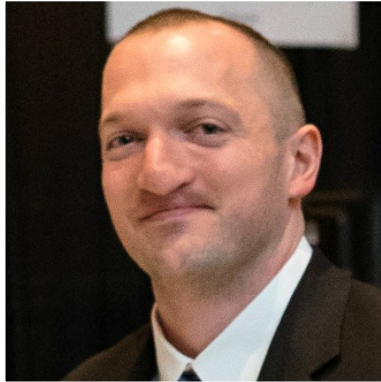
The customer experience markedly impacts a brand’s reputation.

Savvy executives use that reality to their advantage. They *market* their customer experience to more successfully (and cost effectively) connect with customers.

After ensuring they are consistently delivering for customers, they work to translate their experience into marketing collateral. Aware that competitors all advertise can advertise similar product, they may urge marketing to promote a “no questions return policy” or “no wait time support line.”

Not fixated on their own company’s marketing messaging, these executives also make customer advocacy a paramount organizational priority. They advise customer experience and marketing leaders to organically drive product advocacy, such as by creating brand “communities” or providing an easy mechanism for customers to share reviews.

## MEET THE AUTHOR



### Brian Cantor

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#CCWDIGITAL

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.



# 2018 Special Reports Calendar

Special Reports Calendar is subject to change.  
Updated as of 5/1/18

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

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*Special Reports Calendar is subject to change.*  
Updated as of 5/1/18

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

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# UPCOMING EVENTS



## Chief Customer Officer Exchange

May 6-8, 2018

Park Hyatt Aviria Resort, Carlsbad, CA

[www.chiefcustomerofficerexchange.iqpc.com](http://www.chiefcustomerofficerexchange.iqpc.com)



## CCW Las Vegas

June 18-22, 2018

The Mirage, Las Vegas, NV

[www.customercontactweek.com](http://www.customercontactweek.com)



## Chief Experience Officer Exchange

July 29-31, 2018

Chicago, IL

[www.chiefexperienceofficerexchange.iqpc.com](http://www.chiefexperienceofficerexchange.iqpc.com)



## Customer Experience Automation

September 5-7, 2018

San Jose, CA

[www.customerexperienceautomation.iqpc.com](http://www.customerexperienceautomation.iqpc.com)



## CX Week Canada

September 12-14, 2018

Toronto, ON, Canada

[www.cxweekcanada.iqpc.com](http://www.cxweekcanada.iqpc.com)

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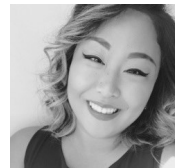
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