



TOOLKIT

Designing the Modern
Customer Experience

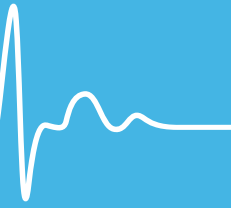
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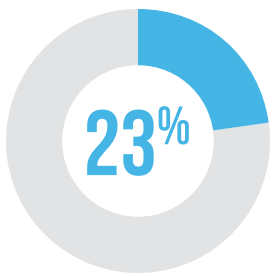
**The Modern Customer
Experience Pulse Check**

The Modern Customer Experience Pulse Check

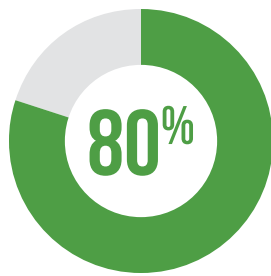
Think you're ready to provide a modern customer experience? Think again. ICMI's latest research indicates a challenging landscape ahead for customer service providers.



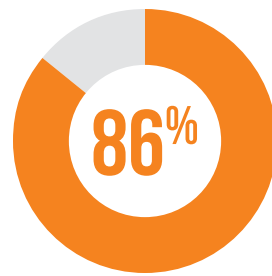
The experience is inconsistent and it's causing serious damage.



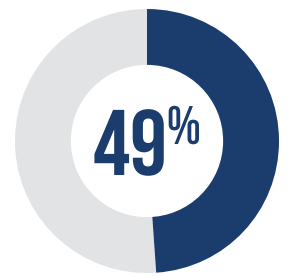
Only 23% of companies say they provide a consistent experience throughout the customer journey



80% of customers say companies put more effort into selling than providing excellent customer service

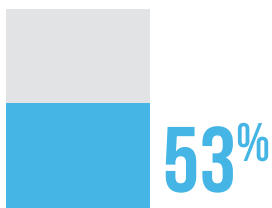


86% of consumers are very likely to switch companies after a bad service experience

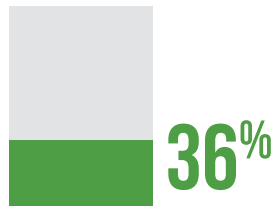


49% of consumers would post something negative on social media following a bad experience

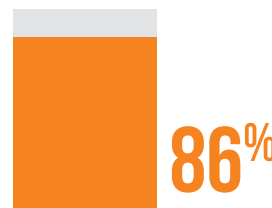
Customers don't want to use the channels you think they do.



The majority of customers (53%) would prefer to use online chat before calling a company on the phone



Just one-third of customers use email to contact companies



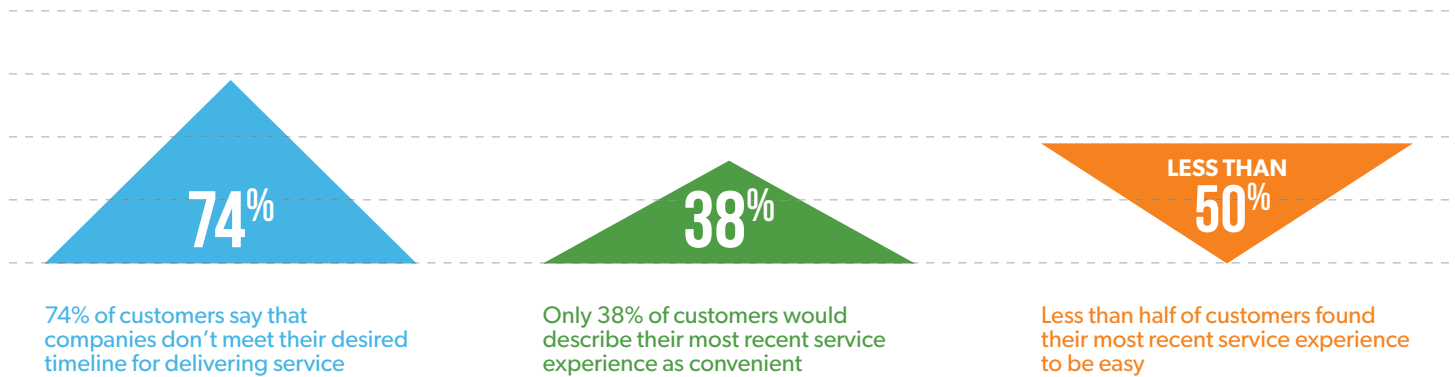
86% of customers expect to have their choice of channels for follow-up or proactive communication



50% of customers think that it's important for companies to offer a mobile app

The Modern Customer Experience Pulse Check

Customers are growing impatient.



There's a hopeful future for the companies that adapt.



**Customer Expectations
Identification Guide**

Customer Expectations Identification Guide

Customers and Consumers: What's the Difference?

CUSTOMERS

Transactional – They **Buy**

Value Minded

Answer to Consumers

CONSUMERS

Relational – They **Use**

Experience Minded

Answer to No One

While customers and consumers could be one in the same, the consumers carry more weight. They switch brands. They care about the experience. They are the real influencers of service.

10 Key Customer Expectations (And Where Companies Are Messing Up)

1. Be Accessible – These days, being accessible means much more than having a toll-free number and well trained agents. Customers want companies who can meet them whenever and wherever they are.

How well do your channel options and hours of availability align with the expectations of your customers?

2. Treat Me Courteously – Courteous behavior goes well beyond how an agent treats a customer during an interaction. You're not treating customers with courtesy if they experience any of the following in your organization:

They're forced to repeat themselves

They suffer through transfer after transfer

They're forced to navigate systems or processes that are unnecessarily complicated and arduous

In what way are you not treating your customers courteously today? What would it take to change that?

Customer Expectations Identification Guide

3. Be Responsive to What I Need and Want – Whether through surveys, comment cards, quality monitoring or any number of other methods, we’re about to collect tons of data on what our customers need and want, but are we responding to that insight? Customers are in control of our businesses and if we aren’t responsive to their needs, we’ll lose our relevance.

What’s something that your customers want and need, yet you don’t provide? What’s holding you back?

4. Do What I Ask Promptly – One of the most significant changes in the world is our sense of urgency. We’ve become a society conditioned to instant gratification and, in service, its required organizations to revise many of their standards. This is particularly true with response times for channels such as email, chat, or social media, where a growing number of organizations are queuing and handling contacts as they occur.

When did you last review your standards for service and accessibility? Are they still appropriate?

5. Provide Well-Trained and Informed Employees – Contact center work is increasing in complexity as more channels get added, service expectations become more immediate, and the implications of a bad experience “gone viral” are highly profound. All of this makes the challenge and importance of well-trained and informed employees greater than ever before.

How current are your recruiting and hiring practices? Does your training, tools and processes enable your employees to perform to their fullest potential?

6. Tell Me What to Expect – Transparency in processes, insight on reasoning, and clarity when setting expectations is an excellent way to prevent things that shouldn’t be issues from becoming issues. Customer uncertainty can lead to unnecessary interactions, create doubt in a customer’s mind, and detract from an organizations trust and credibility.

In what ways are you unclear with customers when it comes to setting expectations? What are the potential advantages and disadvantages of being more transparent with them?

Customer Expectations Identification Guide

7. Meet Your Commitments and Keep Your Promises – Do what you say and say what you do, it's as simple (and complicated) as that. If your organization emphasizes the importance of a great customer experience, you've got to align your people, processes, and technologies so that they deliver on the promise of a great experience.

Have you recently broken a promise to your customers? What can you do to recover from it? Are you currently make a promise to customers that you can't deliver on? What needs to change to make it happen?

8. Do It Right the First Time – If our customers have an issue that we can and should address and resolve, there shouldn't be any excuse for us not to do it right the first time. This is totally interrelated with the expectation that we'll meet our commitments and keep our promises.

Does your contact center have a contact type or particular channel of service that doesn't "get it right the first time"? Have you identified the root cause of the issue? What steps must you take to ensure that you get it right every time?

9. Follow Up – A customer should never have to contact us to find out when a payment to them will be made, why production was delayed, or to verify that a product or service was delivered as expected. If we're telling customers what to expect, meeting our commitments and keeping our promises, and doing it right the first time, then we should take ownership of the proactive follow up with customers every single time.

What is the most common reason that a customer has to follow up with your organization? How can we better anticipate and proactively follow up with these customers?

10. Be Socially Responsible and Ethical – Lapses, or even perceived lapses, in ethics or social responsibility quickly make the rounds in feedback and customer communities. Watchdog groups have established numerous websites and blogs, and consumers can monitor activities and quickly sound alarms. Corporate ethics and responsibility concern the entire organization, but the contact center, as a hub of communication internally and externally, is often at the center of these issues, which can develop quickly.

In what ways does your contact center protect its ethical and social responsibilities? What systems and processes are in place to ensure that your compliance is monitored regularly?

So, what to do with these expectations?

Ensure that your management team thoroughly understands them. Post them prominently. Look for them in customer feedback (collected through surveys and otherwise). And work considerations of them into all decisions, large and small.

Components of a Modern Customer Experience Strategy

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The contact center has the awesome responsibility of serving as the hub of communication for an organization. As the modern customer experience evolves, the contact center has an increasingly important, if not the most important, role in helping to define and execute on an organizations service strategy. At the core of this responsibility are three key components:

- 1. Make it easy for customers to do business with the organization**
- 2. Capture and use key consumer data**
- 3. Create personal, consumer-specific relationships**

In order to make it easy for customers to do business with an organization, you need a framework of standards, guidelines and processes that describe how consumers and the organization can interact and enable access to information, services, and expertise as needed. All of this should be supported with technology that can effectively leverage analytics to understand the most important trends and identify the ideal solutions.

Your modern customer experience strategy can take a variety of forms, but it should be well documented and consider these essential components:

- **CUSTOMER SEGMENTS**
- **TYPES OF INTERACTIONS**
- **CONSUMER PREFERENCE DATA**
- **ACCESS CHANNELS/COMMUNITIES**
- **HOURS OF OPERATION**
- **SERVICE LEVEL AND RESPONSE TIME OBJECTIVES**
- **ROUTING METHODOLOGY**
- **PEOPLE/TECHNOLOGY RESOURCES REQUIRED**
- **INFORMATION REQUIRED**
- **RECOMMENDATIONS FOR IMPROVEMENT**
- **GUIDELINES FOR DEPLOYING NEW SERVICES**
- **CUSTOMER JOURNEY ANALYTICS**

By constructing this strategy, you'll have the ability to formulate the answers to many important questions that are necessary to the development of your strategy.

Components of a Modern Customer Experience Strategy

The customer experience has grown more complex, as it often encompasses many different channels. In many organizations today, it crosses through multiple departments and can have dozens, hundreds, or even thousands of touchpoints. ICMI research suggests that, of all the touchpoints, organizations find the contact center as the most crucial touchpoint in the entire journey. Within the contact center exists a robust data set that, with the right analytics, could reveal everything an organization needs to know about how to effectively satisfy consumers.

Despite the known importance of the contact center, **75% of organizations knowingly hinder** their team from providing the best experience. Only 14% are empowering their agents to deliver top-notch service. When it comes down to it, a lack in technology, few to no analytics, and a limited view of the customer journey is what cuts many of these organizations short of delivering best in class service. Nearly all organizations (98%) agree that real-time information is vital. Yet, over **one in every five contact centers has zero visibility** into basic information such as contact history when interacting with customers. It's critical for not just the contact center, but the entire business to have greater visibility into the journey.

Advantages of Customer Journey Analytics:

Highlight and understand customer and consumer personas

It isn't enough to know who's buying from you. In the age of consumer power, you've got to understand the end user and their ability to demand and influence.

Find the patterns in behavior and experiences

When things go off the rails, how soon and comprehensively do you know the root cause? Rather than correct experiences as a reactive response, you can anticipate roadblocks, discover the path of least resistance, and build experiences around how customers and consumers actually behave.

Know the outcomes

When you're able to view the end to end journey, map patterns, and engineer better experiences, you're able to better understand the outcomes. By knowing the patterns and the outcomes, organizations can anticipate consumer needs or customer behaviors and proactively address them before they ever arise.

Make the Most of Your Data

Make the Most of Your Data

Collecting and effectively measuring and acting on data is another essential component of the modern customer experience strategy. This information comes from a variety of places, including systems, departments and external sources of information. There is no deficit of data in the contact center, but there is an overwhelming feeling when it comes to refining the list to what is usable, actionable knowledge.

In order to determine the information that you need for your strategy, you should identify the following about your data:

- The information you need for each step**
- The form it should take**
- Where it comes from**
- Who or what produces it**
- When you need it**
- How and when it fits into your strategy**

Your information requirements can be broadly categorized as either “push” or “pull”.

PUSH: The information needs to be delivered as soon as it becomes available (e.g. workload trends that impact real-time resource requirements).

PULL: The information is stored and is accessible as needed (e.g. HR data on tenure by recruiting source).

Allow Agents to Build Personal Customer Relationships

ICMI’s research found that frontline agents are the most critical touch point of the customer journey, yet alarmingly, 74% of customer service leaders acknowledge that they do not fully empower their agents to provide the best customer experience. The modern customer experience can only fully thrive when the frontline is totally empowered to do their best work.

**Potential Contribution to
Other Business Units**

Potential Contribution to Other Business Units

Business Unit	Benefits Provided by the Contact Center
Sales and Marketing	<ul style="list-style-type: none"> Provides detailed information on customer demographics Tracks trends and response rates Enables permission-based targeted sales and marketing Supports segmentation/branding Provides customer input on competitors Provides customer surveys and feedback
Financial	<ul style="list-style-type: none"> Captures cost and revenue information by customer segment Contributes to the control of overall costs Serves as an early warning system Is essential to successful mergers and acquisitions Contributes to shareholder value Is essential in establishing budgetary strategy and priorities
HR/Training	<ul style="list-style-type: none"> Contributes to recruiting and hiring initiatives Contributes to skill and career path development Contributes to coaching and mentoring processes and expertise Helps foster a learning organization Contributes to training and HR expertise and processes
Manufacturing/ Operations	<ul style="list-style-type: none"> Pinpoints quality and/or production problems Provides input on products and services usability and clarity Contributes to product documentation and procedures Highlights distribution problems and opportunities Facilitates communication related to capacity or production problems
Research and Development/ Design	<ul style="list-style-type: none"> Provides information on competitive direction and trends Highlights product compatibility issues and opportunities Provides customer feedback on usability Differentiates between features and benefits from the customers perspective Identifies product and service differentiation opportunities
IT/Telecom	<ul style="list-style-type: none"> Further organization wide infrastructure development Further self-service usage and system design Provides a concentrated technology learning ground Provides the essential human bridge between diverse processes and systems Is a driver of innovation in IT/Telecom advancements
Legal	<ul style="list-style-type: none"> Enables consistent and accurate customer communications and policies Serves as an early warning system for quality problems Identifies and addresses impending customer problems Provides a rapid response to news/media reports Contributes to internal communication Serves as a training ground for customer service policies

Why Companies Love To Operate In Silos

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A successful omnichannel customer experience can only happen as the result of cross-organizational cooperation. In other words, companies must tear down their functional silos to enable the customer facing entities (like the contact center) to have full exposure to the customer’s journey and the context in which customers make decisions for the consumer. Increasingly, we find that the contact center is at the heart of an integrated – holistic – company strategy to serve its customers. The historical desire by organizations to operate their business units as contained entities, making decisions that affect only their work team, is incredibly damaging to the customer experience. Silos are the enemy of context. They cloud the transparency of customer behaviors and unnecessarily complicated an organizations ability to deliver on consumer expectations. Companies may love silos, but they won’t love the impact on their bottom line if they continue to let them stand. As the contact center integrates and blends within the organization, a holistic, more comprehensive view of the customer experience becomes even more important.

In this near future, decisions made by contact center leadership will affect ALL lines of business. Changes made by the HR department, IT, Finance and Marketing will affect the entire integrated contact center, rather than just an isolated business unit. For that reason, an integrated contact center strategy becomes even more important. It is no longer the case that one line of business contact center can do well while another struggles. In the new contact center environment – we all succeed or we all fail. It’s in this new environment that the value of full context on the consumer experience is critical to success. It’s in the integrated business where an end-to-end understand of the customer journey empowers leaders to make decisions that reduce effort, improve overall satisfaction and lower costs. It’s in this new normal that we see the effects of consumer power driving business decisions, rather than siloed entities operating on internal success factors alone.

But, that’s not happening everywhere, and some organizations not only continue to operate in silos – but they happily do so. It can be a detrimental choice, so why do companies love to operate that way despite the risk? Why isn’t the contact center more integrated in every organization?

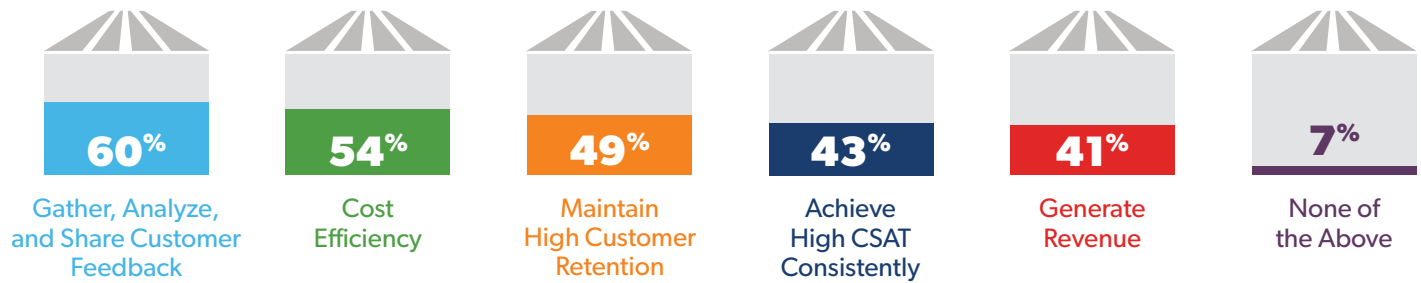
One reason: the contact center is seen as providing minimal value and in a majority of organizations is viewed as a “cost center”.



Another reason: contact centers are inconsistently delivering value to other business units and their organizations as a whole.

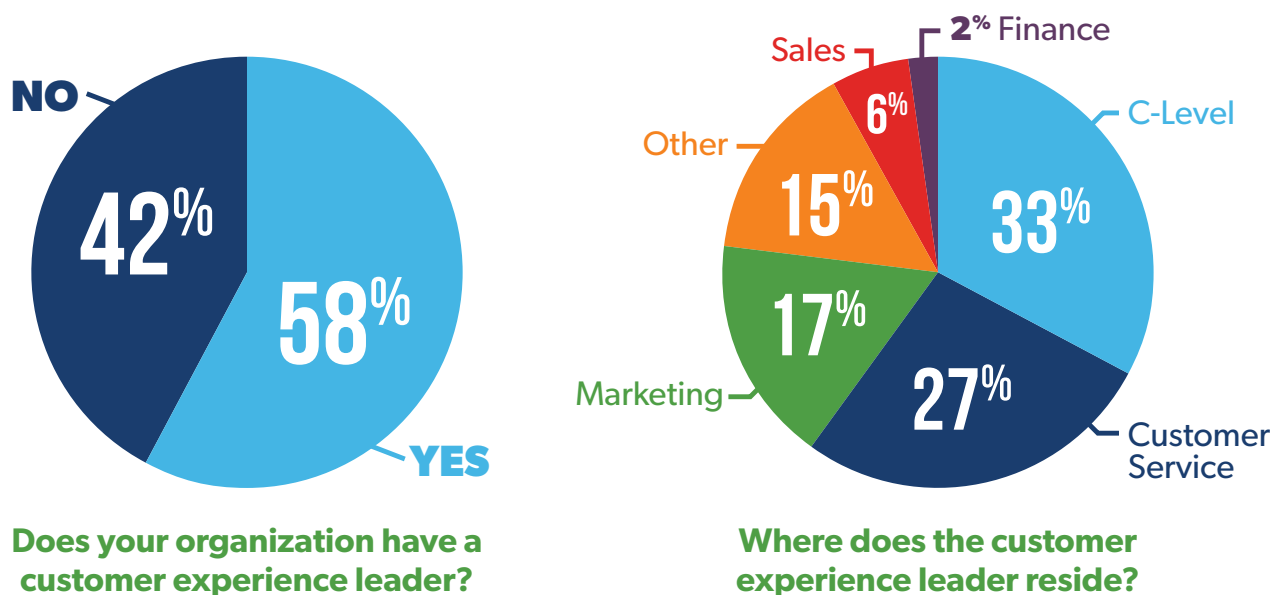
Why Companies Love To Operate In Silos

IN WHICH OF THE FOLLOWING WAYS DO CONTACT CENTERS PROVIDE VALUE TO THEIR ORGANIZATIONS?



The main reason that companies operate in silos? There's rarely one individual who owns the overarching operational strategic plan and holds the individual business unit leaders responsible for working together to support the organizations vision, mission and strategy.

When **everybody** owns the customer experience, nobody owns the customer experience.



Herein lies the challenge for a large percentage of organizations: they are either lacking a formal customer experience team or are without leadership who can coordinate a strategic plan across the business. This is having a serious negative impact on organizations, as less than one-fourth of contact center leaders believe that their organization provides a consistent customer experience across the customer journey according to ICMI research.

Unless organizations want to continue to operate in silos and fail to deliver on the modern customer experience, they must:

Have a comprehensive customer experience strategy

Be led by someone who can unify business units in fulfilling the organization's mission, vision and values

Appropriately collect, analyze and act on consumer data and business intelligence

Tips for Creating Personalized Customer Experiences

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- ✓ Customers and prospective customers should be segmented (e.g., by geography, volume of business, level of service purchased, unique requirements) and defined on how the organization will serve each.
- ✓ Think through who your customers and prospects are, how they access service now, how they prefer to communicate, the sites and communities they tend to use, and where they discuss your services, company, market and competitors.
- ✓ Ensure that your management team thoroughly understands the 10 basic customer expectations. Post them prominently and make a habit of considering them when making decisions.
- ✓ Don't guess at how you're doing. Services shouldn't be created based on what your team "believes" customers expect, get your information from the source. Listen through social channels, interactions with agents, and conduct surveys that are frequent and detailed.
- ✓ Remember that customers don't usually know what they want until you show it to them. If you want to differentiate through service, by definition, you'll need to go beyond industry norms.
- ✓ Build cross-functional teams to ensure a common focus on service customers. The contact center cannot single-handedly meet and exceed expectations – that takes the organizations combined information, support, processes, products and services.
- ✓ Ensure that evolving customer expectations form the context in which you develop your customer experience strategy. They should drive everything from how you segment customers to what channels you make available, service level objectives, hours of operation, etc.
- ✓ Use three key questions as part of your decision process: What are your customers' expectations? Are you meeting and exceeding them? Are you using the fewest possible resources to do so?
- ✓ Develop a global view of your organizations mission and principles. Identify the "big picture" in terms of the organization's mission and direction and how the contact center supports overall objectives. Then take steps to ensure that every person understands the "why" behind what they are doing, and how these principles apply to day-to-day tasks and responsibilities.
- ✓ Equip agents to educate customers on self-service options. Agents should be trained on the advantages and use of these alternatives so that they can encourage customers to use these options when appropriate.
- ✓ Involve agents in system design. Your agents should actively serve on project teams responsible for creating new processes, evaluating channel offerings, and building new systems. They can also help monitor and test systems and interrupt customer behavior and feedback.
- ✓ Remember that new capabilities both depend on and dramatically affect training, policies, planning, budgeting, other systems and many other issues.
- ✓ Leverage the context of where a customer is at in their journey to better anticipate their needs and deliver service that is both proactive and preventative.

About ICMI & Five9

About ICMI

The International Customer Management Institute (ICMI) is the leading global provider of comprehensive resources for customer management professionals -- from frontline agents to executives-- who wish to improve customer experiences and increase efficiencies at every level of the contact center. Since 1985, ICMI has helped more than 50,000 organizations in 167 countries through training, events, consulting, and informational resources. ICMI's experienced and dedicated team of industry insiders, trainers, and consultants are committed to helping you raise the strategic value of your contact center, optimize your operations and improve your customer service. ICMI is a part of UBM plc (www.ubm.com), a global events-led marketing services and communications company.

About Five9

Five9 is a leading provider of cloud software for the enterprise contact center market, bringing the power of the cloud to thousands of customers and facilitating approximately three billion customer interactions annually. Since 2001, Five9 has led the cloud revolution in contact centers, helping organizations transition from legacy premise-based solutions to the cloud. Five9 provides businesses reliable, secure, compliant and scalable cloud contact center software designed to create exceptional customer experiences, increase agent productivity and deliver tangible business results.

For more information visit www.five9.com.