Governing the Customer Experience Across Channels

With numerous customer touchpoints, it's crucial for companies to provide a consistent and satisfying customer experience across all channels. It's also important to be cost-effective. Key is choosing the best metrics to assess how well each channel fulfills the expected customer experience. In this e-book, find out how to optimize and analyze data collected from each channel and apply the findings to a customer experience management strategy.

TechTarget

Use CEM Software For a Lofty Goal: Customer Satisfaction

BY LINDA ROSENCRANCE

EACH DAY BUSINESSES struggle to understand exactly what their customers know about their organizations so they can deliver the right information to the right customer at the right time. But companies also have to ensure they balance the cost of doing business with the happiness of their customers.

To do that, these companies need more than CRM technology—they need customer experience management (CEM) software, according to analysts. Although CRM helps organizations understand what they know about their customers, CEM technology allows businesses to determine what the customers know about them by creating a shared view of those customers across the organizations.

"What we're seeing is more and more companies adopting the same CRM platform for sales, marketing and customer service, which means 'I can link all of those things together.' And they're calling it CEM because CRM has always seemed somewhat limited before; for example, companies had something for sales, something for service," said Rebecca Wettemann, an analyst at Nucleus Research Inc.

"[Applications allow] sales to see what service requests are coming in and to understand what's going in their accounts. Service is not just being able to take incoming calls, but it monitors what's coming in over the Web, on Twitter feeds, on communities—both the ones that companies create themselves and the ones out there where customers are talking," she said.

Wettemann added that it's still early in terms of being able to link things together effectively. But leading companies have invested in the tools so that companies can monitor those external sites to find out what's being said about them, she said.

"More important than the technol-

ogy is what [they] do with it," she said. "For example, Comcast sending an automated response to someone who tweets about its horrible service is just as bad as or worse than no response at all. Companies need to think about more thoughtful ways to respond when they see that customers are talking about them."

Kate Leggett, a senior analyst at Forrester Research Inc. in Cambridge, Mass., said customers don't want to go to a company's website and see a phone number, then a chat box, then an email link and then a Web self-service site that are all disconnected.

"The customer could get a chat agent who may not understand what interactions he's had over the phone or over email," Leggett said. "What you want is a site that ties all these channels together and offers these communication channels to customers based on who they are, the business that they're in and the type of issues that they have."

Businesses have to understand what the customer is interested in based on the searches the customer has done on the website—something Leggett called "personalized proactive contextual service."

"You want to offer multiple communication channels to your customer and you want to tie them all together so a customer can start an interaction on one communication channel and move it to the next and not have to start the conversation again,"

Leggett said. And companies should offer communication channels based on how their customers want to interact with them.

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"For financial services, perhaps customers don't want to interact over Twitter or Facebook, but if you're a retail shop that caters to 16-year-olds, you may want to have a Facebook page where you can do customer service off your Facebook page," she said.

In addition to being familiar with their demographics, on the back end companies have to ensure they have a universal customer service record so they can understand all the interactions a customer has had with them, Leggett added.

"Companies have to understand who the customer is and what has happened in the past in order to deliver good service, and they have to make that information available to the agents in the contact center," Leggett said. "You can't have these silos of com-

munication channels. You also have to understand that each communication channel has a cost associated with it. Some are high-cost, some are low-cost and what a company is trying to do is balance the cost of doing business with

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—JOHN RAGSDALE, vice president of technology research, Technology Services Industry Association

how happy their customers are."

Michael Krigsman, CEO of Asuret Inc. in Brookline, Mass., said while CRM is focused data—with "pure CRM" focused on transactional data, for example, how much has a customer bought—CEM software is focused more on the intangible experiential aspect.

"The CEM experience data is going to cover what the user experience is like—where did they click on the website? What did they like? What did they not like?" Krigsman said. "CEM is looking at it from the point of view of the customer. The company has to figure out how to use the technology to manage that information from all the various channels."

Businesses need to gather and aggregate the information about what the customers are doing in those different channels and then use this information for marketing purposes, he said.

"They want to determine which of their customers matter more than the others. One way to segment that is to ask which customers buy from them," Krigsman said. "Then the company needs tools to aggregate this type of data and collate it with its own database and determine who's actually influential online, because there may be other metrics that matter aside from who's buying what or how much they're spending."

John Ragsdale, vice president of technology research for the Technology Services Industry Association, said companies finally understand how important it is to do this on the support side. Marketing has long understood it, he added.

"We're seeing technical support and consumer support getting a lot more sophisticated and using analytics," he said. "They're trying to get smarter about what types of customers are asking what types of questions, because that helps them build proactive support and knowledge base content and self-service initiatives as well as prioritize changes to the product." ∎

LINDA ROSENCRANCE has written about technology for more than 10 years and has been a reporter for more than 20. A former *Computerworld* reporter, she is a freelance writer in Massachusetts and also an author of several true crime books.

Measure Contact Center Analytics Across Channels, Have Happy Customers

BY LYNN HUNSAKER

CUSTOMERS VIEW the company as a whole, whether communication is with service, marketing, sales, billing or any other part of the organization. Accordingly, best-practice service metrics and contact center analytics enable holistic views of the company and the customer.

With the rapid expansion of multichannel service, the importance of end-to-end customer experience visibility cannot be overstated. End-to-end customer experience transcends product lines, geographies, functional areas, channels and time. According to recent research from Ovum, 74% of consumers use at least three contact center channels for customer service-related issues, and 44% of consumers prefer non-voice channels.

First call resolution (FCR) is often measured in the call center and sometimes separately for self-service. But overall, FCR—regardless of service channel—may be the ultimate measure of customer experience success. Customers prefer not needing service in the first place, but when they do reach out for help, they want to feel confident they've received an effective answer right away and move on to other endeavors.

According to *eBusiness Customer Service and Support Benchmarks* by Forrester Research Inc. in Cambridge, Mass., only 23% of self-service webpages ask customers whether the answer provided by a customer service channel solved their problems. By not measuring customer feedback, companies are ignoring an important aspect of customer experience management (CEM) technology.

Emotion analysis through text and speech analytics can paint a more complete picture when combined with the overall FCR metric, indicating the level of confidence customers feel

about whether the answer they received has resolved the issue at hand.

Text-mining applications can help companies analyze data within written records of customer interactions. For audio recordings, speech analytics applications can automate analysis of call samples using a wide range of filters.

The following metrics assess the customer experience in order of customer-centricity in these service channels: chat, communities, email, social media and text messaging.

Chat

- Percentage of chat participants acknowledging that a provided solution is successful
- Customer wait time during chat
- Customer requests for re-phrasing of questions and solutions

Ensuring a positive customer experience requires a blend of effectiveness and efficiency, catering to the customer's circumstances. These metrics assess the agent's ability to quickly assess customer context and access the needed information to the customer's satisfaction. Text-mining applications can tabulate these metrics from recorded chat logs.

Communities

- Content rating
- Endorsements (such as "tell a friend"

or "like" links)
- Percentage of questions of which the question originator acknowledged the answer
- Percentage of visitors who post additional questions (unrelated to their initial questions)
- Time from question post to answer post
- Repeat visits

Customers access communities to enhance their experience through others' knowledge. High-quality, timely content and answers to customers' questions determine whether customers will have a positive experience and whether they will trust the community as a useful resource in the future. Most community platforms enable content ratings and endorsements; it may be necessary to request additional functionality from the community platform vendor to track answer acknowledgment, answer timeliness and repeat usage of question features.

Email

- Success acknowledgement from the question originator
- Incident turnaround time, by severity level and customer-specified timing
- Longest delay in queue

Customers send emails to companies for a number of reasons. Some are too busy to call, while others have

the extra time to wait for an answer. Still others want to receive lengthier instructions in writing. Although their response-time expectations are relatively lower, they may have a specific window of opportunity to receive a company's reply to fulfill their needs. Automation of these metrics may require a request for additional functionality from the email platform vendor.

Social Media

- Percentage of solutions acknowledged by recipient as successful
- Endorsement of solutions (such as number of shares, embeds, "like" ratings, @replies, direct messages, comments, wall posts, third-party blog mentions)
- Time from originator's post to solution post
- Increased usage of self-service referenced by a solution post
- Sentiment changes after a solution post

Customers use social media to express themselves, learn from others and help others avoid or gain experiences they've had. Prompt company response can engage the customer positively and have a far-reaching impact on other customers and prospects.

Text Messaging

- Percentage of text message

requests by repeat users
- Percentage of customers acting on text message account alerts
- Percentage of text message participants acknowledging solution as successful

Customers like text messages for timely updates and accessing information remotely. The flexibility and spontaneity that is unique to text messaging can have a great effect on the customer experience. SMS texting applications enable text mining to tabulate these customer experience metrics.

To effectively use customer experience metrics, organizations should research what prompts customers to use each channel and their specific expectations for that channel.

Segment the customer experience metrics by what causes customers to use each channel rather than demographics.

The customer's perspective is the key to excelling in CEM technology. Holistic views of customers, and measurement of multichannel performance as the customer sees it, will reveal substantial opportunities to differentiate organizations for superior customer experience. ■

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For a Single View Of Customer, Experts Single Out CEM Technology

BY LINDA ROSENCRANCE

WITH SO MANY ways for customers to interact with companies, it's imperative to create a single view of the customer from multiple channels in the contact center. Customer experience management (CEM) technology can help companies do this so they can share that information with agents across the different channels in the contact center.

Donna Fluss, president of DMG Consulting LLC in West Orange, N.J., said the problem is that even though most enterprises build multiple channels, they set up separate groups (phone, email, chat) to handle customer questions, complaints and concerns.

It's difficult to have a single view of the customer because of all the forms of communication, Fluss said. Some companies just don't have the resources to devote to monitoring Twit-

ter, Facebook or other social media sites. But that's not acceptable to customers, and it's hurting their brands and bottom lines, she added.

"There are multiple groups and multiple people and multiple technologies, so the worlds didn't meet—the email response management team manages the emails, but the phone agents don't know about that and vice versa. And that's the way it still is in the vast majority of organizations," Fluss said.

"The technology is available, but most contact centers have yet to adopt them."

"What we're seeing is investment by all the players to say a contact center is not just the calls or emails that come in but an ongoing monitoring of what's happening out there," said Rebecca Wettemann, an analyst at Nucleus Research in Boston. "Text analytics becomes important, following Twitter becomes important, following any other communities out there that may

be talking about my products or services becomes important."

CHALLENGES WITH INTEGRATING MULTIPLE CHANNELS

Wettemann said many companies with traditional call centers find that integrating the multiple channels can result in an expensive integration project or an implementation of a new system that has most of the multichannel data integrated already.

For example, companies using mature CRM products can find it challenging to incorporate multiple channels because older CRM applications were just for managing a call center or Web services, she said.

"We're going to see more investment in customer experience management technology that takes a more holistic view of the company, and it's going to mean new technology for a lot of companies," she said.

If nothing else, companies have to figure out how to share data among the separate, disparate systems or at least provide all their agents access to the same customer information, Fluss said.

"They have to have one effective servicing environment that brings in all the inquiries regardless of their source and that shows in the application what their source was," she said. "It's not just important to have a single view of data, but you also have to have a standardized service environment where

your service levels are consistent, independent of the channel."

Fluss said companies that don't want to update their servicing environments can install overlay technologies that sit on top of the servicing environments, grab the information they need from different places and bring in a consolidated view of the customer.

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"That will give all the agents in a contact center 80% of the data they need on a single screen," she said. "But it's not inexpensive, so organizations aren't in a huge rush."

CEM TECHNOLOGY TOOLS YOU CAN USE

Paul Greenberg, president of the 56 Group LLC and author of *CRM at the Speed of Light*, said from the standpoint of contemporary channels, the tools matter.

"There are tools that aggregate all that information, but then they integrate that information into the customer record with varying customer relationship management systems in a way that provides you with the ability to pull it up and take a look at it," he said.

The important thing is the integration of all the channels into a single customer record, and from a slightly more advanced standpoint, the next step is the ability to then act on the event being integrated into that customer record, Greenberg said.

"So let's say it's a tweet with a complaint in it—within the CRM system right from the tweet you can pop open something that says 'open a case,' " he said. "And then all the workflows are triggered, and it sends it to the appropriate people who need to read it, and then the agents take care of it."

HOW CEM SOFTWARE AGGREGATES CUSTOMER DATA

Michael Krigsman, CEO of Asuret Inc. in Brookline, Mass., agreed that companies need to use software to aggregate customer information from all the channels.

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> —MICHAEL KRIGSMAN, CEO, Asuret Inc.

Twitter, it becomes incorporated with the company's knowledge base. The software correlates the Twitter question with the existing knowledge base information," he said.

"From the point of view of the agent, the Twitter interaction is really very similar to an email exchange because the agent doesn't care if it goes out via email or Twitter. The contact center software manages that and gives the information to all the agents," Krigsman added.

When the case is resolved it gets incorporated into the knowledge base as well.

"It's new, but more and more companies are doing it," he said. ∎

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Customer Experience Management Gives Dell, Amex an Edge

BY LYNN HUNSAKER

TO BE TRULY successful in customer experience management (CEM), companies must know what their customers care about and design their businesses to deliver. First call resolution is widely accepted as the ultimate service metric. More important than measuring customer service is managing what enables it.

Regardless of the channels they use, customers expect companies to acknowledge a full history of interactions, readily understand the context of their plight and provide a prompt solution. Companies following CEM technology best practices regularly test their assumptions about their customers' perceptions and expectations and orchestrate their strategies accordingly. American Express Co. reinvented its customer service by focusing on what the customer thinks. A Net Promoter Score metric, along with satisfaction ratings, is tied to compensation for everyone from front-line employees to senior executives. These tools replaced traditional service metrics and internal quality monitoring.

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The credit card provider applies positive customer feedback to future calls, which are viewed as opportunities to build relationships and create lasting emotional connections with custom-

ers. These calls help customers access unused benefits from their existing credit cards, but it's not necessarily an up-sell to a different card.

> Negative customer feedback is used to follow up with customers to learn how to better understand and address their concerns.

Negative feedback is used to follow up with customers to learn how to better understand and address their concerns. This feedback acts as a teaching tool that customer care professionals can learn from. Integrated customer data and contextual cues eliminate the need to access multiple screens during a call, and the virtual service center is continually improving customer-centric navigation and ease of use.

American Express shifted from hiring people with call center experience to "hiring the will and teaching the skill," with a professional development path to advance employees' careers in the company. Training focus is 30% technical and 70% on active listening. The ideal interaction involves an assessment of the customer's mood, understanding the reason behind the call, unscripted conversation and a description of existing features that the customer might be unaware of or unsure how to use. The customer decides how long she wants to spend on the call, and agents determine their own schedules.

These practices led to an average increase of more than 10% in "tell a friend" scores and an 8%-to-10% lift in customer spend, as well as a 50% drop in employee attrition and a 10% increase in service margins. Since adopting these methods, American Express has topped the J.D. Power and Forrester rankings for credit card providers, and it has been listed among the BusinessWeek "Customer Service Champs."

DELL REVAMPS ITS CEM TECHNOLOGY STRATEGY

Dell also reinvented its customer service with a focus on the customer. The company had invested in technologies during the 1990s to listen to and communicate with customers. But it found that technology is necessary but insufficient, as negative customer sentiment peaked in 2005. The Direct2Dell blog and IdeaStorm suggestion system opened dialogue between customers and senior management.

Executives also asked front-line employees to notify them of "dumb things we do" and involved employees company-wide in focusing on customers. To help customers find the right content at the right time, Dell.com workflow was transformed across 13 billion

webpages in 26 languages.

For the 150 countries serving Dell customers, content can be readily co-ordinated with product launch delays and other changes. Content is rapidly deployed in the context of the website, using rich content editing and review tools and system-based workflows for collaboration and approval.

User experience has greatly im-proved, with easier browsing, minimal broken links and dynamic search. In redesigning workflow, Dell conducted extensive customer studies to ensure effectiveness of the site and its bene-fits from the customer perspective.

FOCUS ON CUSTOMER SERVICE EXPECTATIONS

Knowing what customers expect from their support experiences is essential. One leading software maker directed customers to request refunds through self-service on its website. It discov-ered that this was actually escalating customer dissatisfaction, as the major-ity of customers really wanted verbal confirmation from a live person for re-fund situations.

Now in the process of retooling its workflow, the company learned the ex-pensive way that assumptions should always be tested across the custom-er's end-to-end experience. Testing all channels from a customer's point of view may provide valuable insights and empathy, but remember that different types of customers have different per-

spectives as well.

Customer experience leaders such as American Express and Dell view service as an opportunity center rather than a cost center.

> Testing all channels from a customer's point of view may provide valuable insights and empathy, but remember that different types of customers have different perspectives as well.

"It's easy to make the case that large call centers have customer influence on par with, if not greater than, that of mass advertising campaigns," said Kerry Bodine, principal analyst at For-rester Research Inc. "Assuming a call center with 3,000 agents and an av-erage of only 50 calls per agent per day, a company has the opportunity to make 1.05 million personal connec-tions each week—and 54.6 million each year."

Expanding those figures to all multi-channel service touchpoints provides organizations with a more accurate estimate of personal connection op-portunities. Remember that only a

fraction of the people exposed to an ad campaign eventually produce revenue for the company, whereas the vast majority of people accessing its services

> Remember that only a fraction of the people exposed to an ad campaign eventually produce revenue for the company, whereas the vast majority of people accessing its services are already producing revenue.

are already producing revenue.

Customer experience stands out when technology, people and processes cater to what customers are trying to accomplish in the larger context of using a product or service. There's no substitute for a deep understanding of the customer's world and the reasons behind her viewpoints in a company's quest to optimize the customer experience. ∎

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